T-SYSTEMS MULTIMEDIA SOLUTIONS

# USER MANUAL

DOCULIFE DESKTOP 5.6
DATE: 05.03.2015

T · · Systems ·

doculife®

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# 1 Introduction

This documentation goes over the functions in doculife Desktop, Version 5.6, when used together with the latest platform release, Microsoft Office 2013, and Windows 8. For system requirements and installation information, please refer to the “Getting started with doculife” documentation.

This documentation is intended for all doculife Desktop users.

Important: The functions that are available will depend on the solution being used, your user profile, your access permissions, and the way your tenant is configured. If you have any questions, please ask your administrator or your solution vendor.

All searches, search results, and choice lists can be modified so as to meet your own specific needs. The screenshots in this manual are based on the **default configuration** for **doculife** and therefore may not be an exact match for your actual setup.

# 2 Formatting and layout used throughout this documentation

This section goes over the most important formatting and layout choices used throughout the documentation. The purpose of these choices is to enable you to get started quickly.

**Buttons, icons, menu commands, keys, window titles, messages, and prompts**

These are all shown in **bold** (e.g., **OK**).

In addition, key names are written in uppercase letters (e.g., **ENTER**).

**Notes**

Notes contain additional information and are indicated as follows:

**Please note:**

This is a note.

**Important**

"Important:" is used to point out information that is important for the process or workflow in question.

**Tip / Shortcut**

Useful shortcuts, additional options, and special settings are indicated as follows:

**Tip**

This is a tip.

**Examples**

Examples of individual functions are indicated as follows:

**Example:**

This is an example.

**Instructions**

When there are multiple instructions / step-by-step instructions, they will be numbered in ascending order. Instructions that only require one single action are indicated with the ▸ icon.

# 3 General security information

This section contains general security information concerning the use of doculife.

Make sure to read it carefully.

## 3.1 Anti-virus protection

doculife does not provide any additional anti-virus protection.

This means that documents and e-mails transferred todoculife will not be checked for malware in doculife.

Make sure to check all documents and e-mails for malicious code on the computer before storing them in doculife.

**Attention! Risk of data loss**

Use an anti-virus product that monitors your data, e-mail, and Internet communications and protects your computer from attacks.

## 3.2 Saving passwords

Due to security reasons, users have to enter their password every time they log in to their doculife account (i.e., connect to the system).

It is possible to configure the system in such a way that users will be able to save their password for a doculife account.

**Attention! Risk of misuse of data**

Saving login information can enable unauthorized users to access your data. Please make absolutely sure that saving login information is allowed by your company’s security policies before doing so.

## 3.3 Using mobile devices

Mobile devices are more vulnerable to malware and spyware attacks. Users are responsible for the security of their own devices.

**Attention! Risk posed by unauthorized data mining and access**

Make sure to only load apps from trustworthy sources on your device. Use appropriate software designed to protect you from spyware and similar attacks.

# 4 Installation requirements

**Supported operating systems**

- Windows 8.1
- Windows 8
- Windows 7 Professional
- Windows Vista
- Windows XP

**Hardware system requirements**

- PC with at least 1.8 GHz CPU, 2 GB RAM, 500 MB of available disk space
- Windows Surface Professional 2 and higher

**Supported Microsoft Office versions (doculife Desktop Suite)**

- Microsoft Office 2003/2007/2010/2013
- Office 365

**Requirements (doculife Desktop Suite)**

The following components are required for the doculife Desktop Suite:

- Microsoft .Net Framework 3.5 SP1
- Visual C++ Runtime Library (only if the scan option is installed (default))

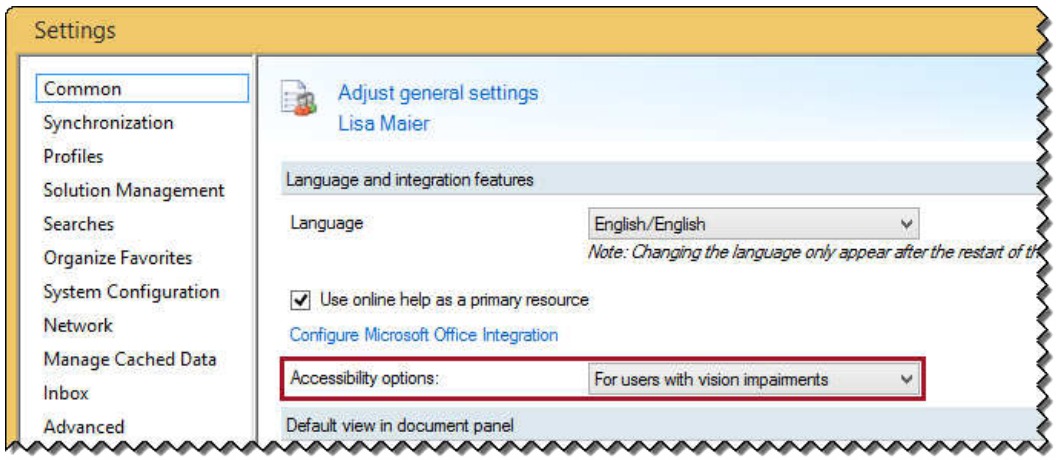
If you do not have these components on the computer where the software will be installed, they will be installed automatically.

# 5 What's new?

Discover the new features in doculife Desktop Version 5.6. This section provides a summary of the most important changes and new features.

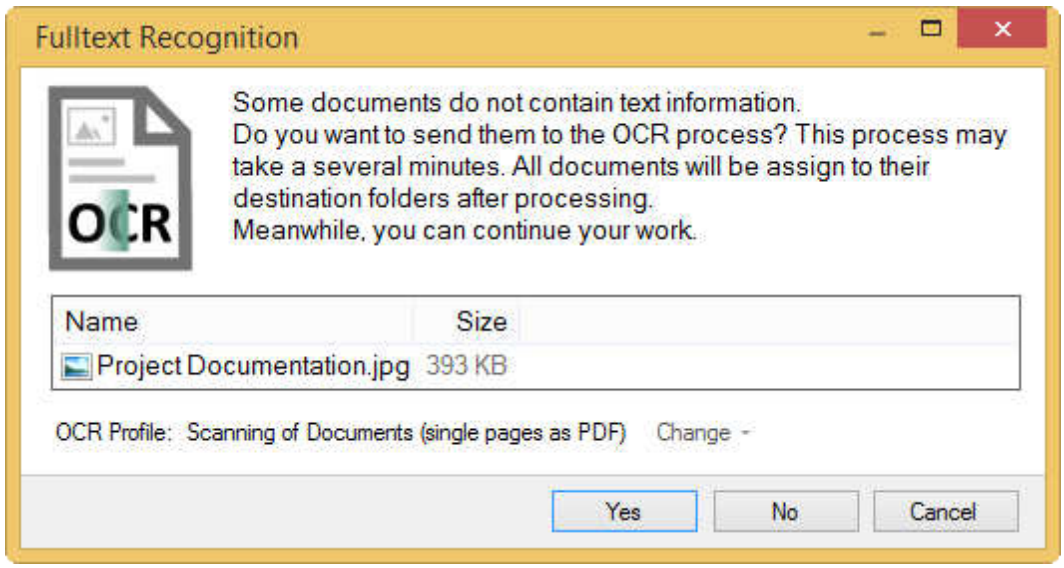
## Accessibility options

doculife Desktop has been developed with accessibility in mind and can also be used by people with visual or motor impairments. In order to do so, the corresponding accessibility options need to be enabled (please refer to the "Accessibility" section).



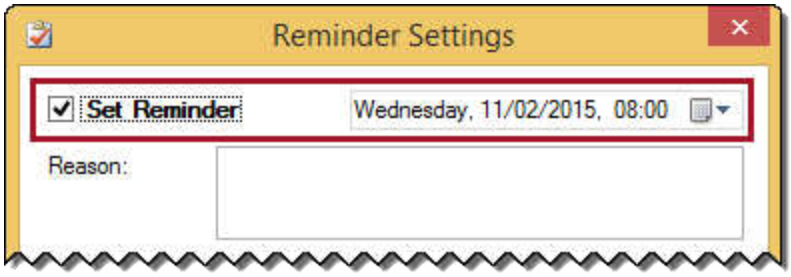

## Full-text recognition on dragged and dropped files (optional)

This function is an extension of the "conventional" scanning function and makes it possible to run full-text recognition on a variety of file formats when they are imported into the DMS (normally, full-text recognition would only be run when using conventional physical scanning). Please refer to the "Full-text recognition on dragged and dropped files" section.


Fulltext Recognition
OCR
Some documents do not contain text information.
Do you want to send them to the OCR process? This process may take a several minutes. All documents will be assign to their destination folders after processing.
Meanwhile, you can continue your work.
Name
Size
Project Documentation.jpg
393 KB
OCR Profile: Scanning of Documents (single pages as PDF)
Change
Yes
No
Cancel

## Reminder with time (optional)

In addition to a reminder date, a time can also be set now (please refer to the "Creating a reminder" section).

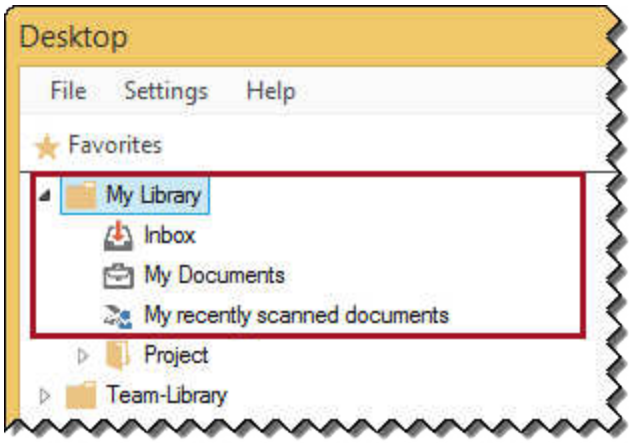



## Importing folders from the filesystem

Complete folders and folder structures can be transferred to the DMS, together with their contents, by dragging & dropping them from Windows File Explorer. Previously, this function was only available for files (please refer to the "Importing folders from the filesystem" section).

## Adding new elements to libraries (folder view) and sorting them

In addition to files and registers, you can now also add special objects (such as My Documents, Inboxes, and Search Folders) to the library (please refer to the "Adding files and registers to the library" section).



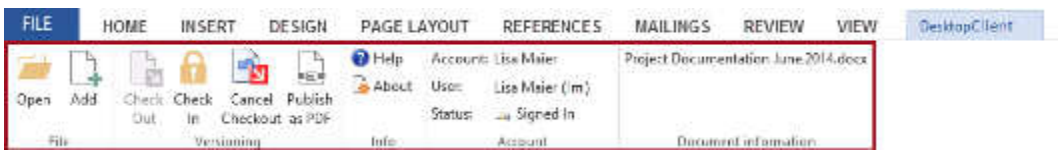

In addition, the contents in a library can be sorted (please refer to the "Sorting in libraries" section).

## Adding documents as attachments by dragging and dropping them

Documents can now be added as attachments to an e-mail by dragging and dropping them (please refer to the "Sending by e-mail, As an attachment" section).

## Office Integration for Microsoft Visio

If you have Microsoft Visio installed, you can use the doculife Desktop Office Integration feature in it (please refer to the "Setting up / customizing Office integration" section).



### Working with encrypted and signed e-mails

It is now also possible to add encrypted and signed e-mails to the DMS (please refer to the "Working with e-mails, Adding encrypted and signed e-mails" section).

# 6 What is doculife?

doculife is a comprehensive multi-tenant solution that enables users to capture, manage, and retain documents and that is designed to cover a document's entire lifecycle.

doculife is made up of the following four components:

1. Scanning – Used to digitize documents
2. Capturing – Used to index and categorize digitized data
3. Document management system (DMS) – Used to store and organize documents, as well as to retrieve them quickly and in a targeted manner
4. Long-term archiving (optional) – Used to store documents in a tamper-proof manner

doculife's hardware and software components are run centrally in a data centre and are made available to users in the form of a cloud service.

## Microsoft Outlook and Microsoft Office integration

doculife Desktop integrates seamlessly into MS Outlook and also features an add-in for MS Office applications. This ensures that DMS functionalities will be available in your existing work environment without the need for cumbersome interfaces and without forcing you to switch between programs. You will be able to access your e-mail communications, the documents you currently have open, and the contents stored in doculife all at the same time.

The Microsoft integration feature is designed to enable you to do the following from MS Outlook and MS Office:

- Dragging and dropping e-mails and documents to the system in order to add them
- Searching for documents stored in the system
- Initiating document editing and creating new document versions
- Storing e-mail attachments either together with the e-mail or separately from it, all in one step (regardless of the option chosen, the system will remember that the attachments and the e-mail correspond to each other)
- Directly sending documents from the system by e-mail in the form of attachments or links

# 7 Getting started with doculife Desktop

## 7.1 Overview

doculife Desktop is seamlessly integrated into your suite of Microsoft Office products.

Everything revolves around the add-in for Outlook, which puts all of doculife Desktop's functions at your disposal.

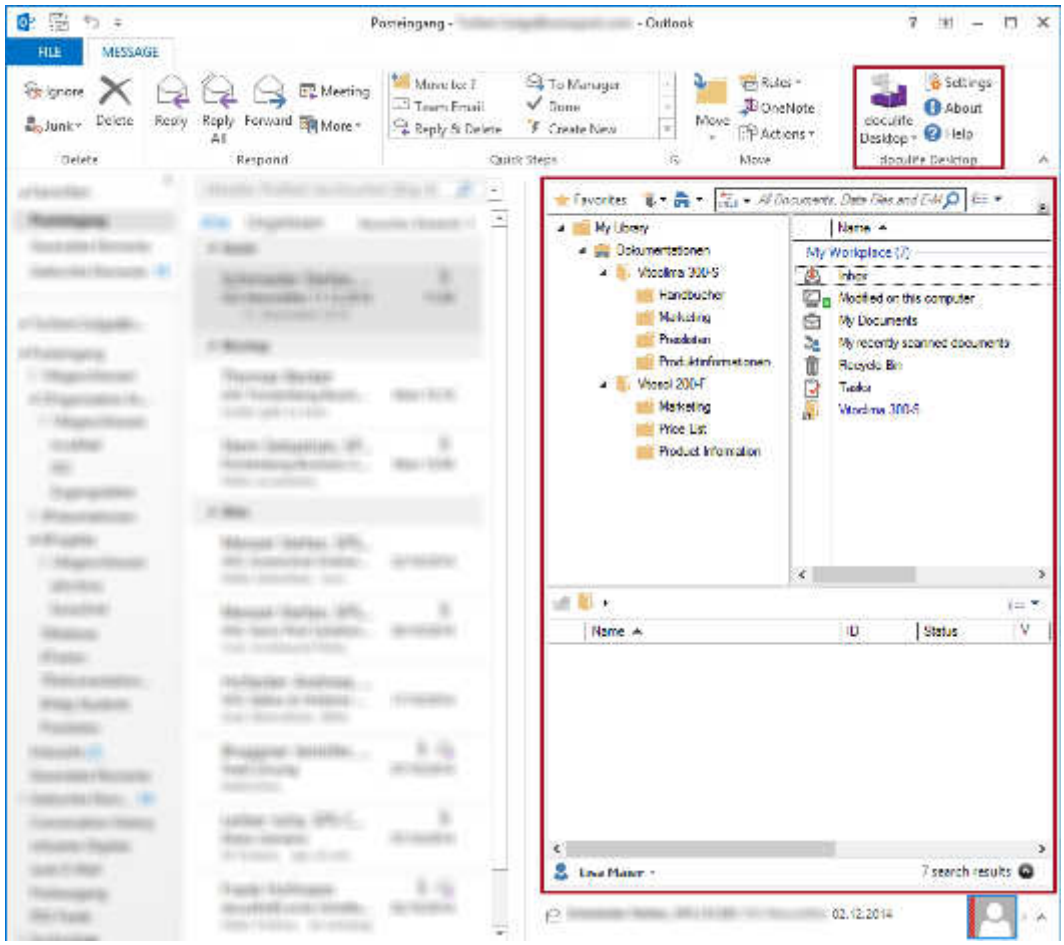
In addition, doculife Desktop's Office integration feature ensures that you will have all DMS functionalities available in Word, Excel, and PowerPoint.

### doculife Desktop as an add-in for Microsoft Outlook

doculife Desktop is seamlessly integrated into Microsoft Outlook and will be shown on the right side of the screen.

doculife Desktop's functions will be added to the **Home** ribbon.

*Figure: doculife Desktop as an Outlook add-in*

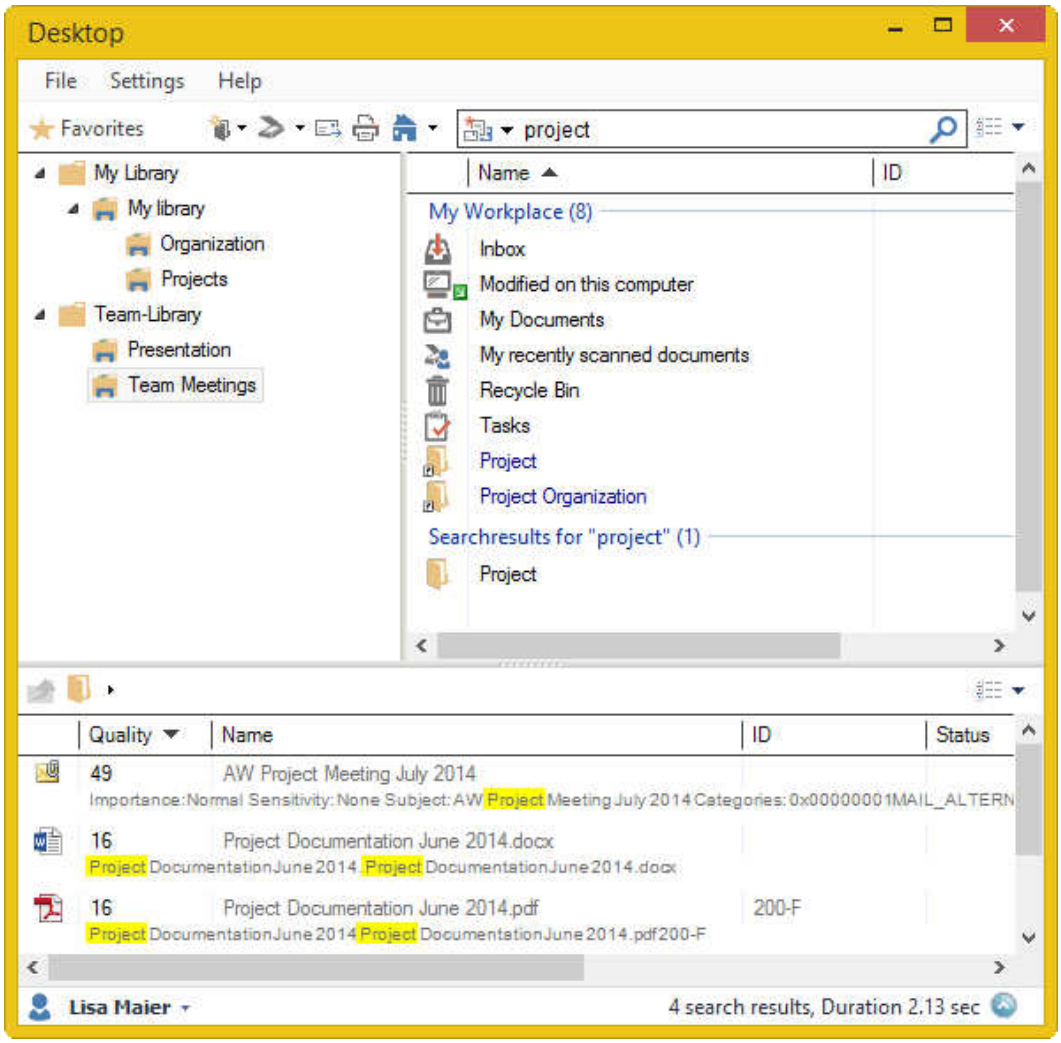



### doculife Desktop in its own separate window

doculife Desktop can be run in its own separate window and can also be used without Microsoft Outlook.

Important: However, please note that Microsoft Outlook must be running in order for you to be able to use the e-mail functions.

*Figure: doculife Desktop in its own separate window*




**doculife Desktop as an Office add-in for Word, Excel, PowerPoint, or Visio.**

The Office integration functionality provides all DMS functionalities with its own ribbon:

## 7.2 Accessibility

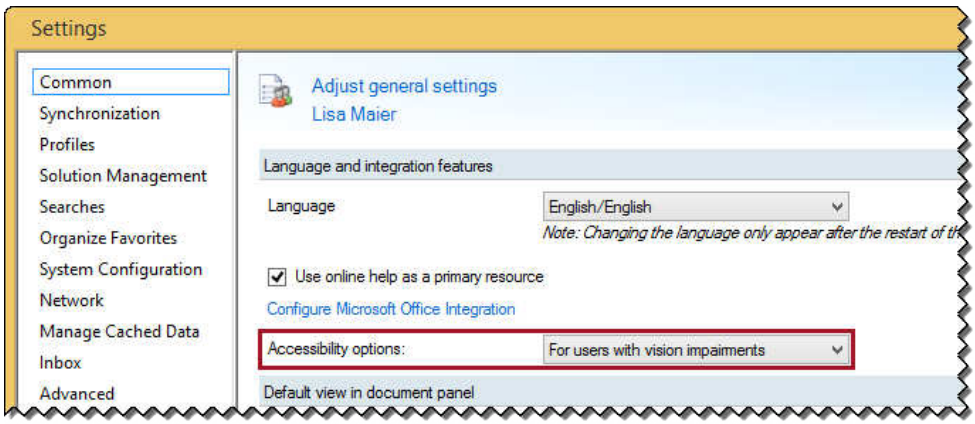
doculife Desktop has been developed with accessibility in mind and can also be used by people with visual or motor impairments. In order to do so, the corresponding accessibility options need to be enabled.

This will make the following functionalities available:

- All controls and texts will be accessible with the Tab key
- It will be possible to use a screen reader to acoustically reproduce all controls and texts with speech output
- The Windows settings for visually impaired users will be applied (e.g., front size, contrast)

**To enable the accessibility options for visually impaired users, follow the steps below:**

- Open the **Settings** and, under **Common**, select the **For users with vision impairments** option.



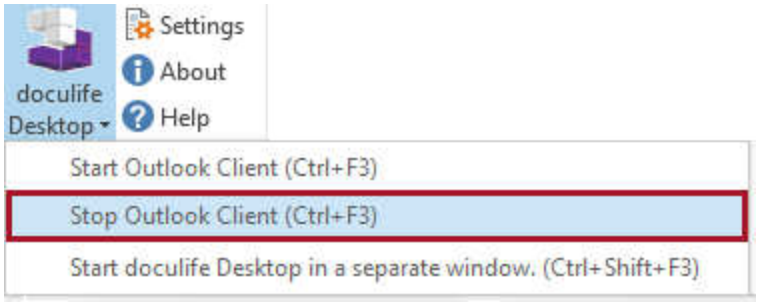

## 7.3 The Outlook add-in

### 7.3.1 Opening and closing the add-in for Microsoft Outlook

The add-in for Outlook needs to be opened every time you run Microsoft Outlook.

- To open the add-in for Microsoft Outlook, go to the **Home** ribbon and click on the **doculife Desktop** icon or press **CTRL + F3**.

- To close the add-in for Microsoft Outlook, click on the **doculife Desktop** icon and then click on **Close** or press **CTRL + F3**.




Important: The add-in for Microsoft Outlook will be closed automatically when you exit Outlook.

### 7.3.2 Showing and hiding the add-in for Microsoft Outlook

If the Outlook add-in is open, you can easily hide and show it as necessary in order to temporarily make the Outlook window bigger.

- In the **Home** ribbon, click on the **doculife Desktop** icon.

  The Outlook add-in will be hidden.

  If you click on the icon again, the Outlook add-in will be shown again.

### 7.3.3 Opening and closing in a separate window

1. To start doculife Desktop in a separate dialog box, use one of the following methods:
   - **Double-click on the doculife Desktop** icon on your Windows Desktop.

     Important: Make sure that the Outlook add-in is not running!
   - Click on **Start, All Programs, doculife Desktop**

     Important: Make sure that the Outlook add-in is not running!
   - In the Outlook add-in, click on the **doculife Desktop** icon and then select **Open in separate window** or press **CTRL + SHIFT + F3**.

     In the prompt asking whether you want to run doculife Desktop in a separate window, click on **Yes**.

     The Outlook add-in will be closed automatically.
2. Exit doculife Desktop by clicking on **File**, **Exit** or on the **Close icon** at the top right of the title bar.

## 7.4 Office integration

### 7.4.1 What does Office integration mean?

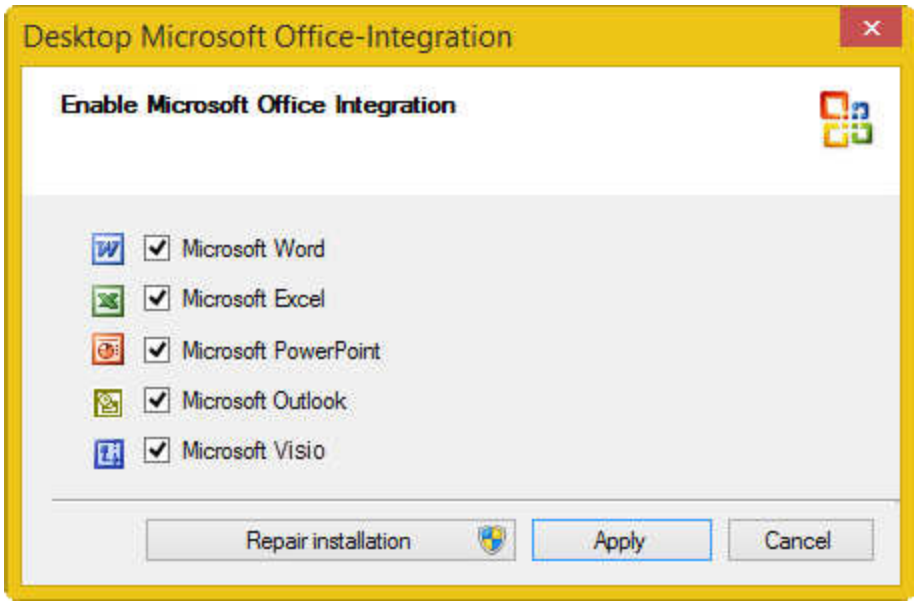
Office integration refers to a feature that can be used to make all DMS functionalities available in every Microsoft Office application. This means that you can work with Microsoft Word, Excel, PowerPoint, or Visio as usual and open and edit documents from the DMS or check in new documents.

In **Office 2013**, the **doculife Desktop** ribbon is used to make doculife Desktop's functions available:

### 7.4.2 Setting up / customizing the Office integration feature

The Office integration feature is set up when doculife Desktop is installed. However, you can make changes to it at any time and specify the Office programs in which you want to use the doculife Desktop add-in.

1. Exit the Microsoft Office program for which you want to set up the Office integration feature.
2. Click on **Apps**, **doculife Desktop, Configure Microsoft Office Integration**.
3. Enable or disable the Microsoft Office program you want.




4. Click on **Apply.**

   A prompt will appear saying that the changes you have made will not be applied until the Microsoft program is restarted.

**Shortcut:**

Click on **Settings, Common, Configure Microsoft Office Integration**.

**Please note:**

If any problems occur with the automatic registration process for the DLLs, you can run the registration process again by clicking on the **Repair installation** button.

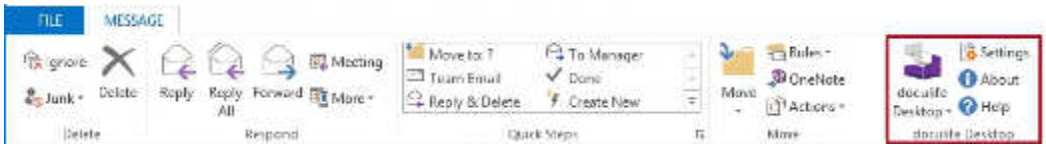
## 7.5 User interface overview

### 7.5.1 Becoming familiar with the user interface

The screenshot below uses the add-in for Microsoft Outlook to illustrate the user interface for doculife Desktop and the way it is subdivided into various panes.

These panes are described in greater detail below.

The functions for doculife Desktop are found on the far right of the Microsoft Outlook ribbon's **Home** tab:




doculife Desktop features the following panes:

(1) Toolbar

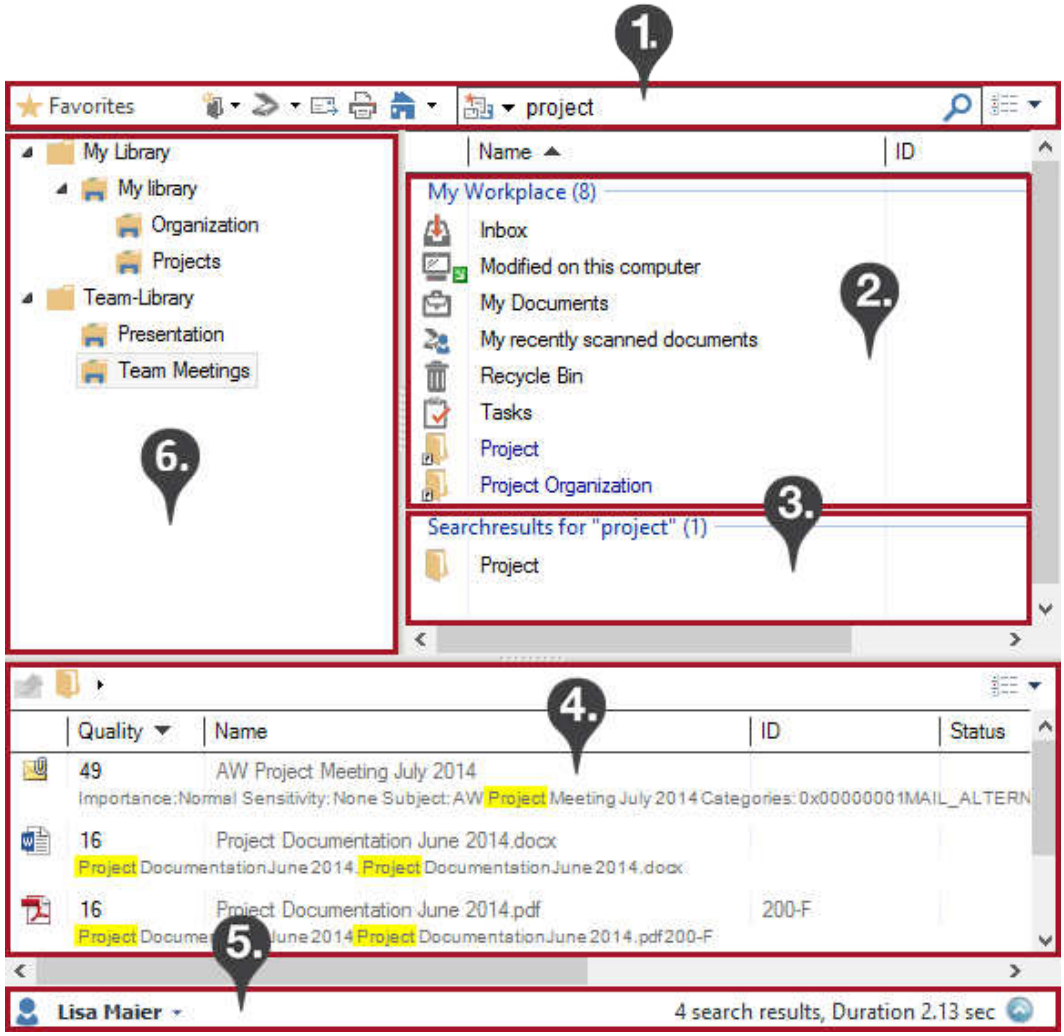
(2) My Workplace

(3) File pane

(4) Document pane

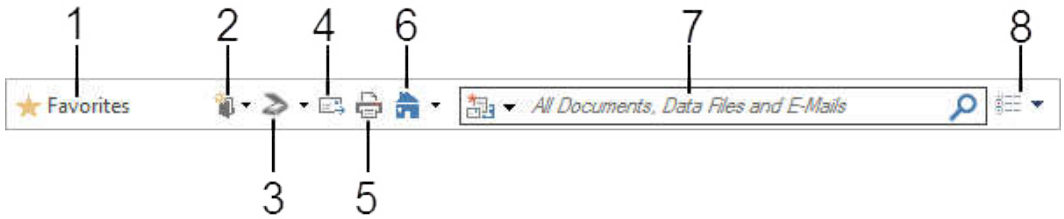
(5) Status bar

(6) Folder view




## 7.5.2 (1) Toolbar

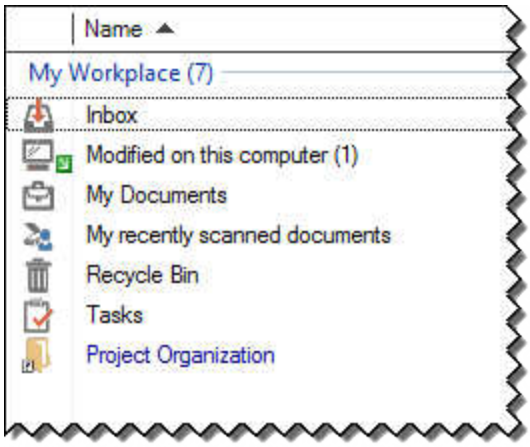
The following image shows the toolbar's individual functions:




| | |
|---|---|
| (1) | Opens the list of favourites and most recently used items |
| (2) | New file / workmap |
| (3) | Scan |
| (4) | Send as e-mail |
| (5) | Print |
| (6) | Shows My Workplace and used to select a search (if configured) |
| (7) | Used to select a search and enter a search term |
| (8) | Used to select views, filters, and sorting and configure the folder view |

### 7.5.3 (2) My Workplace

“My Workplace" is your personal workspace in doculife Desktop, much like your desk at the office. Only you have access to your workplace.




Depending on the solution and configuration you are using, your workplace may contain a number of different objects, such as:

- **Modified on this computer:** Shows all documents that are checked out **and** in progress.
- **Tasks:** The items shown in Tasks will depend on the solution configuration being used. By default, Tasks will show all files and documents with a reminder (for you) scheduled within the next seven days, as well as all checked out documents.
- **My Documents:** A secure storage location in the DMS for your own documents. You can use this folder to store your own (personal) documents if you do not want any other users to have access to them, much like with the “My Documents” folder in Windows Explorer.
- **My recently scanned documents:** Contains the documents that you scanned most recently

  Important: The solution’s specific configuration will determine how long scanned documents will be shown here.
- **Recycle Bin:** Contains the documents, computer files, and e-mails you have deleted.

  Important: The recycle bin is a function that can be configured individually for each tenant.
- **Inbox:** Contains documents that have been forwarded to you for editing. This inbox also serves as the inbox for your doculife e-mail address (provided one has been set up).

  Important: Before you can receive e-mails using your inbox, the inbox must be enabled for receiving e-mails and your doculife e-mail address needs to be set up (see Settings, Inbox).

The following can also be stored in your workplace:

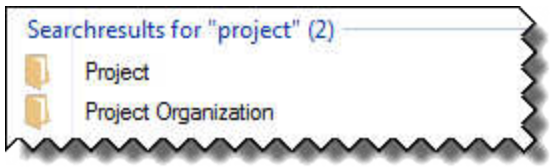
- Links to files on which you are working at the moment (please refer to the “Add to my workplace” section)
- Links to a group inbox

When you click on the **Home** icon, either:

- Your workplace’s contents will be shown and the results for a search will be reset or
- A search will be run, provided you have configured the program to do this (please refer to the “Customizing settings, General information, Default search” section)

### 7.5.4 (3) File pane

The file pane will either show the search results for the files that have been found or the file in which you are currently working. The number of files will be shown in parentheses.



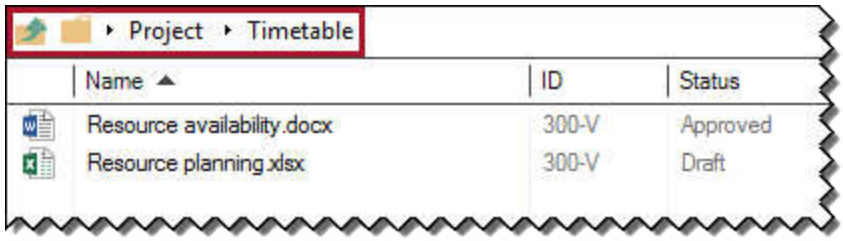

To open a file, simply **double-click** on it. The file’s contents will be shown in the document pane.

### 7.5.5 (4) Document pane

The document pane will either show the search results for all documents, files, and e-mails found or the contents of the current file/the current register if you are navigating within a file.

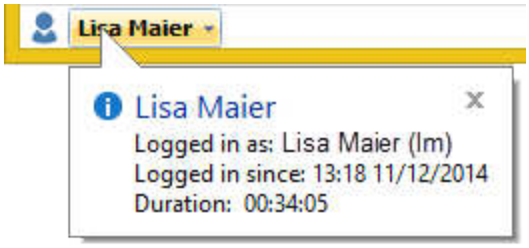
If you run a full-text search, the terms found will be highlighted in yellow in the text summary as per the way the corresponding settings are configured.

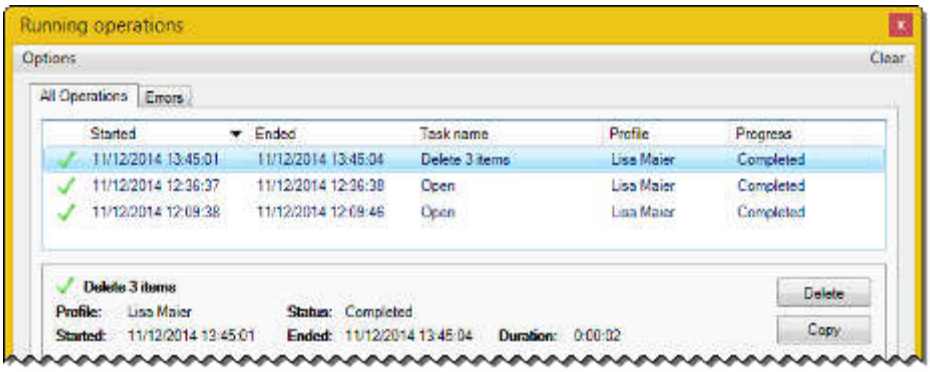
The **navigation bar** will show your current location.



### 7.5.6 (5) Status bar

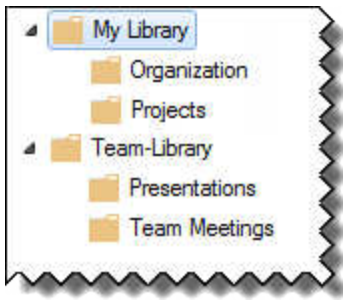
The status bar provides the following information and functions:

| | |
|---|---|
| (1) | Connection status icon<br>Signed in<br>Signed out or connection not active<br>Closed: The account is locked Only in SECPlus/SECmezzanine<br><br>If you move your cursor over the icon, the program will show additional details regarding the connection status:<br> |
| (2) | Your user profile name.<br>If you move your cursor over the name, the program will show additional details regarding the user profile:<br>  <br><br>If you click on the name, a menu with the following contents will appear:<br>– Your user profile or a list of user profiles if you are working with multiple accounts / user profiles<br>– **Manage accounts..** option for editing the names being shown, for example<br>– On SECPlus/SECmezzanine only: **Lock/unlock account** |
| (3) | Information bar<br>Shows the number of search results or of active background processes, for example.<br>Background processes include, but are not limited to, deleting documents/files, copying file structures, and importing e-mails and documents. |

| | |
|---|---|
| (4) | Background process<br>Clicking on this icon will open a dialog box with more details on the background processes.<br>  |

### 7.5.7 (6) Folder view

You can use the folder view to create a “virtual” tree structure (a “view”) that will enable you to clearly lay out files and registers in order to make it easier to manage them (please refer to the “Working with libraries” section). Moreover, you can quickly add files and registers to the folder view by dragging and dropping them.



## 7.6 Getting started with your work

### 7.6.1 Creating files

A file is the topmost level in a repository structure.

**Please note:**

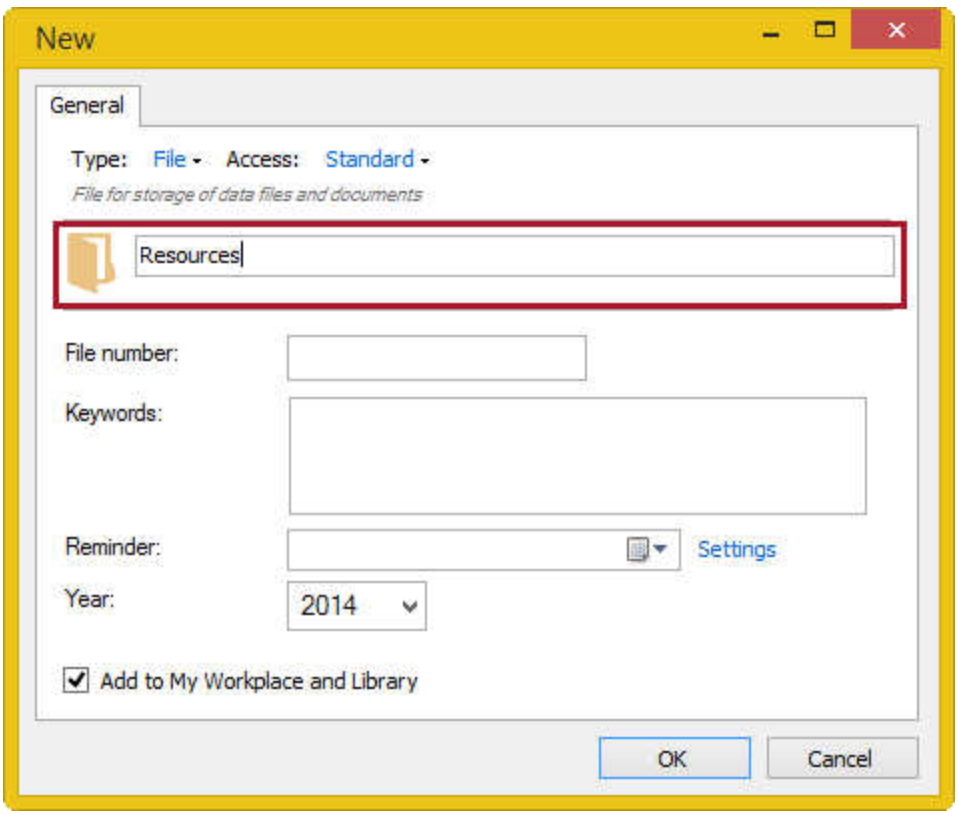
The file types available will depend on your user permissions and on the solution being used.

1. Click on the **New File** icon or **right-click** on an empty area in the file pane and then click on the **New** option. Select the file type you want (e.g., file or personnel file).

   The **New** dialog box will appear.

2. Enter a **name** for the file. This is a mandatory field. The name you enter must be unique.

   The remaining properties are all optional.




Important: The following characters are not permitted in the name: * ? : < > \ /

Important: The properties will depend on the file type.

If the corresponding setting is configured, a file can be automatically added to the workplace and/or library when created. In the example above, the "**Add to My Workplace and Library**" option will add the file both to "My Workplace" and "My Library" (folder view).

Important: You can manage this option as required for your specific needs by

configuring the corresponding setting (please refer to the “Settings, configuring settings, Advanced, Import” section). Depending on the solution being used, this setting can be used to select the action you want (e.g., adding the file to My Workplace only, to My Library only, or to both) or to disable the option entirely.

Important: “My Library” will only be shown if the folder view is turned on.

3. If necessary, change the **Access:** setting for the file. The following options will be available: **Standard**, **Public**, **Confidential**, and **Only me**.

4. Click on **OK**.

   The file will be created and will then be shown in the file pane and, if applicable, in “My Workplace.”

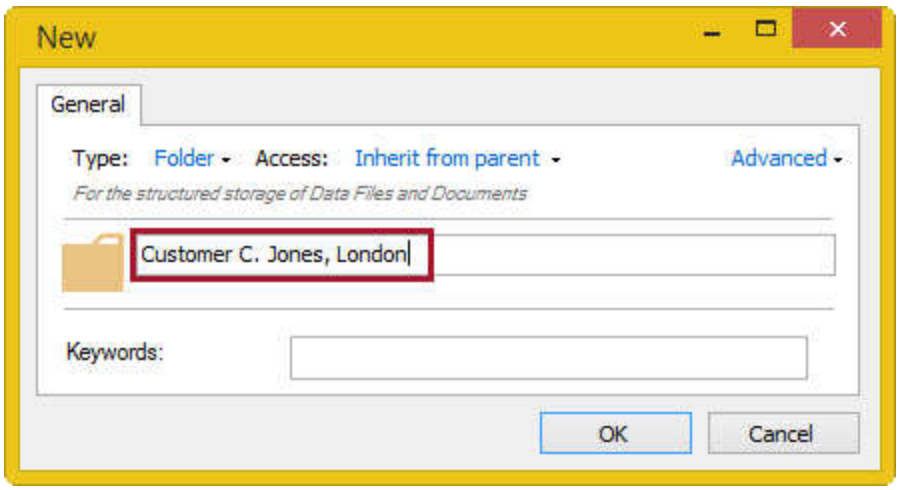
### 7.6.2 Creating registers

Registers can be used to subdivide a file or another register.

1. **Double-click** on the file or register to open it.
2. Right-click inside the document pane, click on **New**, and then click on **Register**.

   The **New** dialog box will appear.
3. Enter the **name** for the register. This is a mandatory field. The name must be unique within its hierarchy level.

   The remaining properties are all optional.




Important: The following characters are not permitted in the name:
* ? : < > \ / |

4. If necessary, change the **Access:** setting for the register. The following options will be available: **Standard**, **Public**, and **Confidential**. The default **Inherit from parent** option means that the access permissions that apply to the file will apply to the register as well.

5. To view or edit the file's properties, click on **Advanced**on the top right and then click on **Dossier Properties**.

6. Click on **OK**.

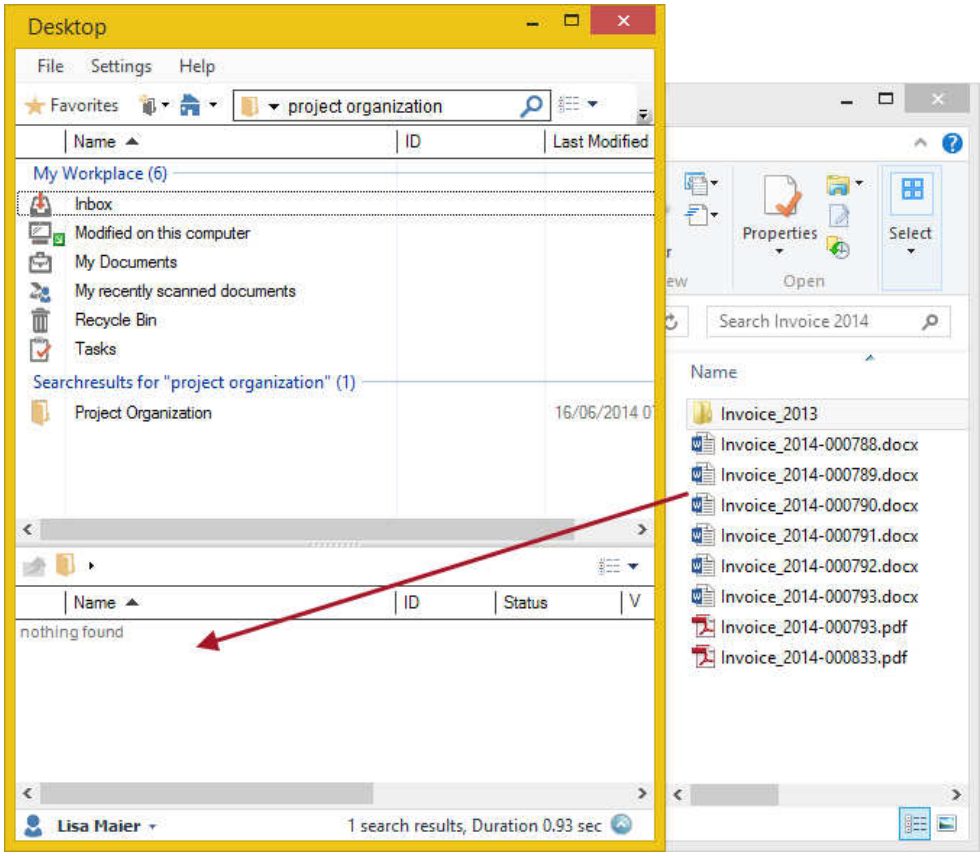
   The register will be created and will be shown in the document pane.

### 7.6.3 Adding documents and folders (drag & drop)

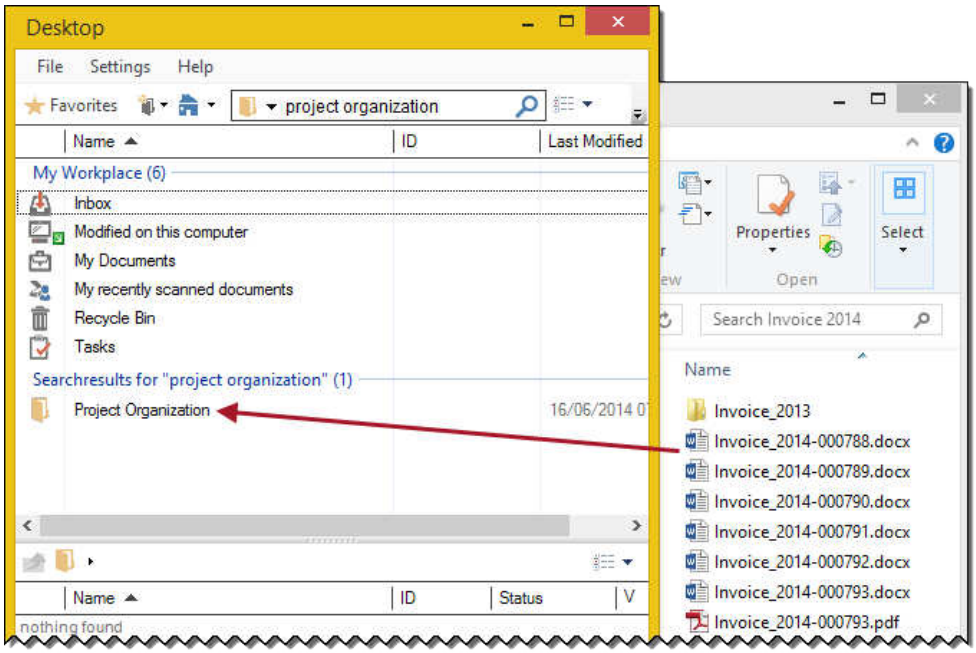
To transfer computer files and folders to the DMS, you can simply **drag & drop** them from Windows File Explorer.

All file formats can be imported.

1. Follow one of the steps below:
   - Open the file or register you want and drag the file or folder to the document pane. If you want the folder to be created as a file, drag it to the file pane.




– Drag the computer file or folder directly onto the file in the file pane or onto a folder in “My Workplace.”




2. Enter the properties you want (a filename will be suggested automatically). Depending on the way the program is configured, some of the file’s property values may be used as

default values.

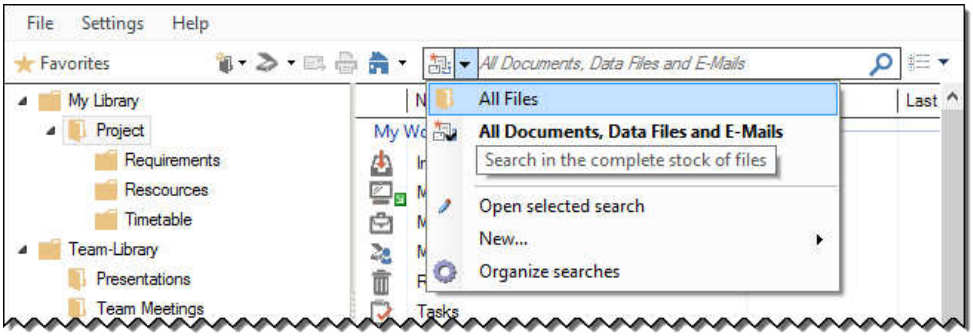
3. Click on **OK**.

### 7.6.4 Searching for a file

Say you have created a file in the DMS and want to view it. To find the file, simply use the **All Files** search.

The following applies in general: To be able to find a file using a search, you will need to have access permissions for the file. When you use the **All Files** search, only the files that match your search criteria and for which you have access permissions will be shown. This applies to the files' contents as well. In other words, you will need the appropriate access permissions in order to be able to view a file's contents.

1. In the search box, select the **All Files** quick search.

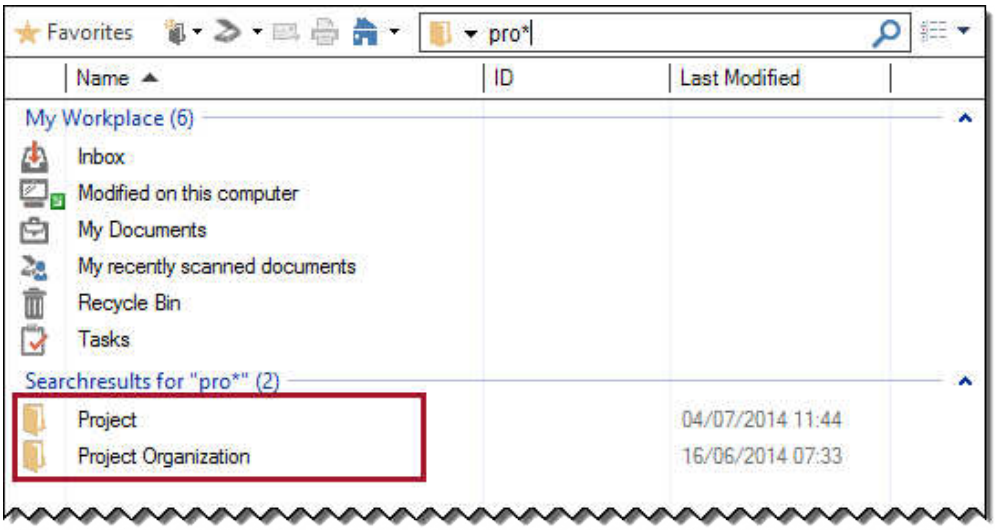



2. Enter the file's name or part of it (Viess* to search for "Viessmann," for example).

   Important: You can enter an incomplete search term by using the * (asterisk) wildcard so that the program will complete the term automatically.

3. Click on the **Search** icon or press the **ENTER** key.

   The files found will be shown in the file pane.

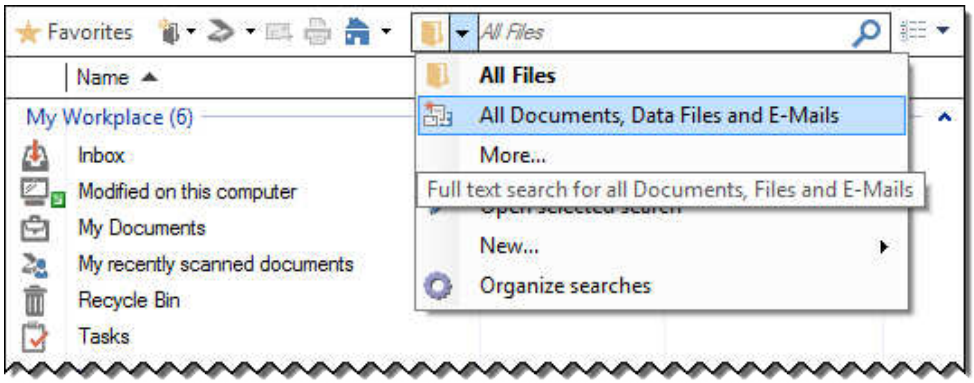


### 7.6.5 Searching for a document

Say you have stored a document in the DMS and want to view it. To find the document, simply use the **All Documents, Data Files and E-Mails** full-text search. You can search for the document by name or by content (full text).

The following applies in general: To be able to find a document using a search, you will need to have access permissions for the document. When you search for documents, only the documents that match your search criteria and for which you have access permissions will be shown.

1. In the search box, select the **All Documents, Data Files and E-Mails** full-text search option.

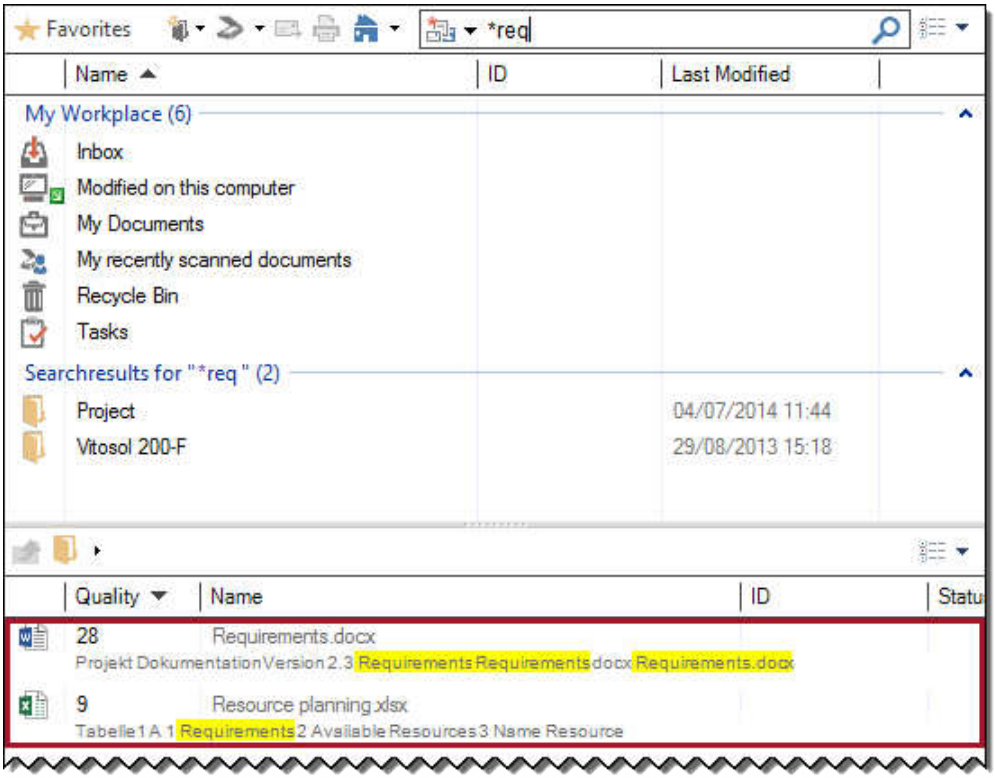



2. Enter one or more terms from the document's name or contents.

   Important: The search is not case-sensitive.

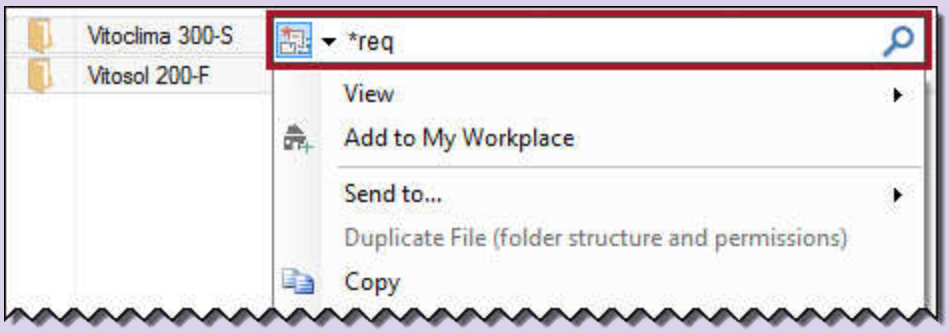
3. Click on the **Search** icon or press the **ENTER** key.

   The documents found will be shown in the document pane. Search terms found in the document's contents will be highlighted in yellow based on the way the program is configured.




**Tip:**

To limit the search to specific files, select the files you want first (use the **CTRL** key to select multiple files) and then **right-click** on them and use the search box in the context menu:



# 8 Organizing repositories

## 8.1 What are the components that make up a repository?

The repository structure in the DMS is flexible and can be customized as necessary. This means that there are no generalized rules, as every user has their own way of working and their own preferred structures.

The topmost level of a repository structure basically consists of **files**. Each of these files can then be subdivided as much as necessary by using **registers**.

Documents, computer files, and e-mails can be stored both in files and in registers.

The **My Documents** folder under **My Workplace** is intended for your personal documents, computer files, and e-mails. You will not be able to add any additional subdivisions to it.

**Please note:**

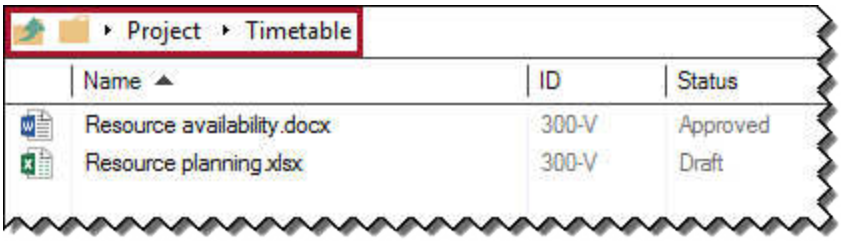
Repository structures are designed to make it easier for you to find your way in the DMS. And thanks to the program's comprehensive, powerful, and intelligent search functions, these structures can be kept simple.

## 8.2 How do I navigate through a repository?

Navigating through the repository basically works the same way as in Windows Explorer.

The navigation bar is located at the top of the document pane and will show your current location.

*Figure: Navigation bar*

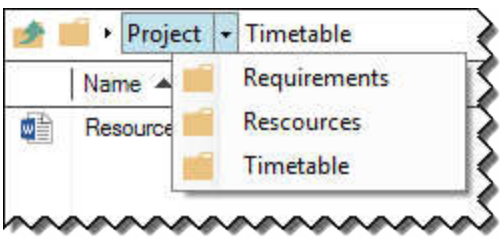



### Selecting a register within the file

You can click on a link to go to a specific register you have already visited.

To select a register of your choice within the file, click on the **right arrow**.

*Figure: Selecting a register*



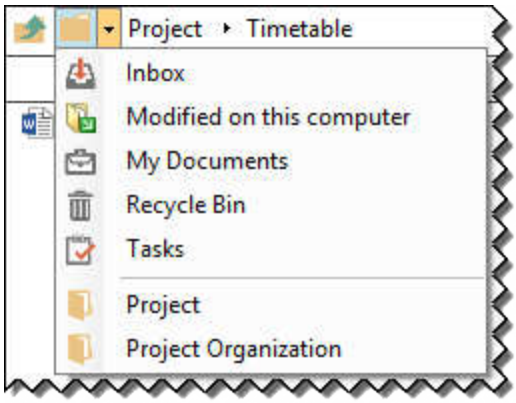

### Leaving a register (navigating upwards)

To leave a register, click on the icon.

## Selecting a different file

To switch to a different file in the file pane, click on the **right arrow** next to the file icon.

*Figure: Selecting a file*



# 9 Quickly accessing files and documents

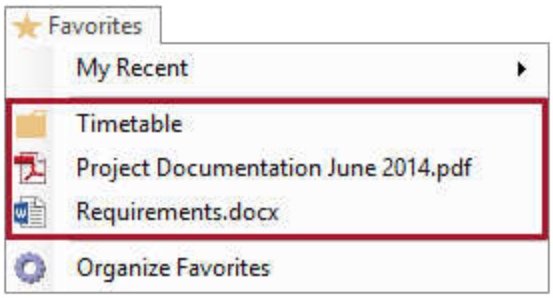
## 9.1 Using favourites

### 9.1.1 What is a favourite?

You can use favourites to save files, registers, and documents that you use frequently and then access them quickly by clicking on the **Favourites** icon.

When you move your cursor over a favourite, a tool tip will appear and show where the favourite is stored.

*Figure: List of favourites*




### 9.1.2 Adding favourites

You can create favourites for files, registers, and documents.

- **Right-click** on the item you want and then click on **Send to....., Favourites** or press **CTRL + D**.

  The item will be added to your favourites.

### 9.1.3 Opening favourites

- Click on the Favoriten **Favourites** icon in the toolbar and select the favourite you want from the list.

  If you click on a file or register, the file / register will be opened and the document pane will show the corresponding contents.

  If you click on a document, the file or register in which the document is stored will be opened and the document will be shown in the document pane.

### 9.1.4 Removing favourites

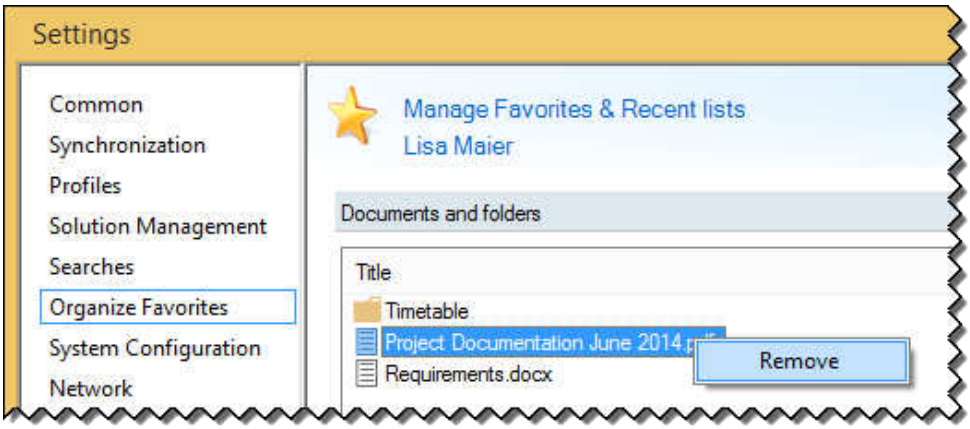
You can remove favourites that you no longer want from your list of favourites.

1. Click on the Favoriten **Favourites** icon and then on **Organize Favourites**

   The **Settings** dialog box will appear.
2. Click on the favourite you want to remove from the list.

   To select multiple favourites, hold down the **CTRL** key as you click on them.

3. **Right-click** and then click on **Remove** or press the **DELETE** key.



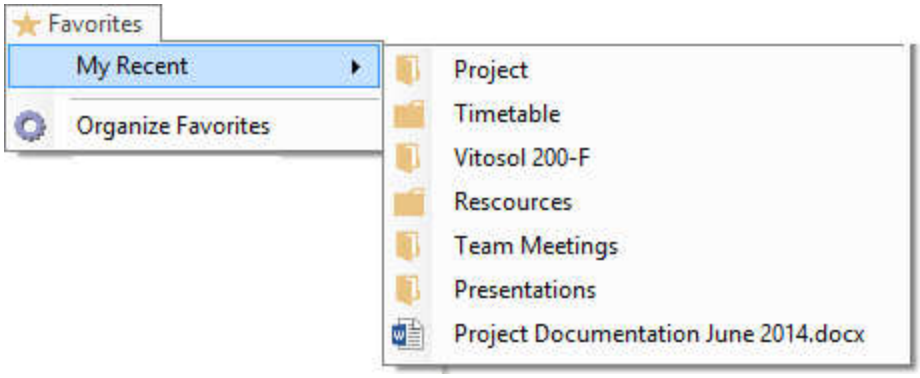

## 9.2 My Recent: History of most recently used items

### 9.2.1 What does “My Recent” show?

The **My Recent** list is automatically filled as you work and will contain the files, registers, documents, and/or e-mails that you have opened most recently. In fact, it works much like the History function on your web browser.

You can use the My Recent list to quickly open an item, and can also clear the list if you want.

*Figure: My Recent*




### 9.2.2 Opening an item in “My Recent”

You can use the “My Recent” list to quickly access the files, registers, documents, and/or e-mails that you have opened most recently.

1. Click on the Favoriten **Favourites** icon.
2. Move your cursor over **My Recent** and select the item you want from the list.

   If you click on a file or register, the file / register will be opened and the document pane will show the corresponding contents.

   If you click on a document, the file or register in which the document is stored will be opened and the document will be shown in the document pane.

### 9.2.3 Clearing the “My Recent” list

The longer you use the program, the more likely it is that the history of most recently used items in “My Recent” will become too long and unmanageable. To fix this, you can empty the “My Recent” list and remove **all entries** from the **My Recent** choice list.. After you do this, the program will start over with the list.

1. Click on the

**Favourites** icon and then on **Organize Favourites**

   The **Settings** dialog box will appear.
2. In the **Organize Favourites** settings, click on **Clear recent list**.

# 10 Working with files and registers

## 10.1 Creating files

A file is the topmost level in a repository structure.

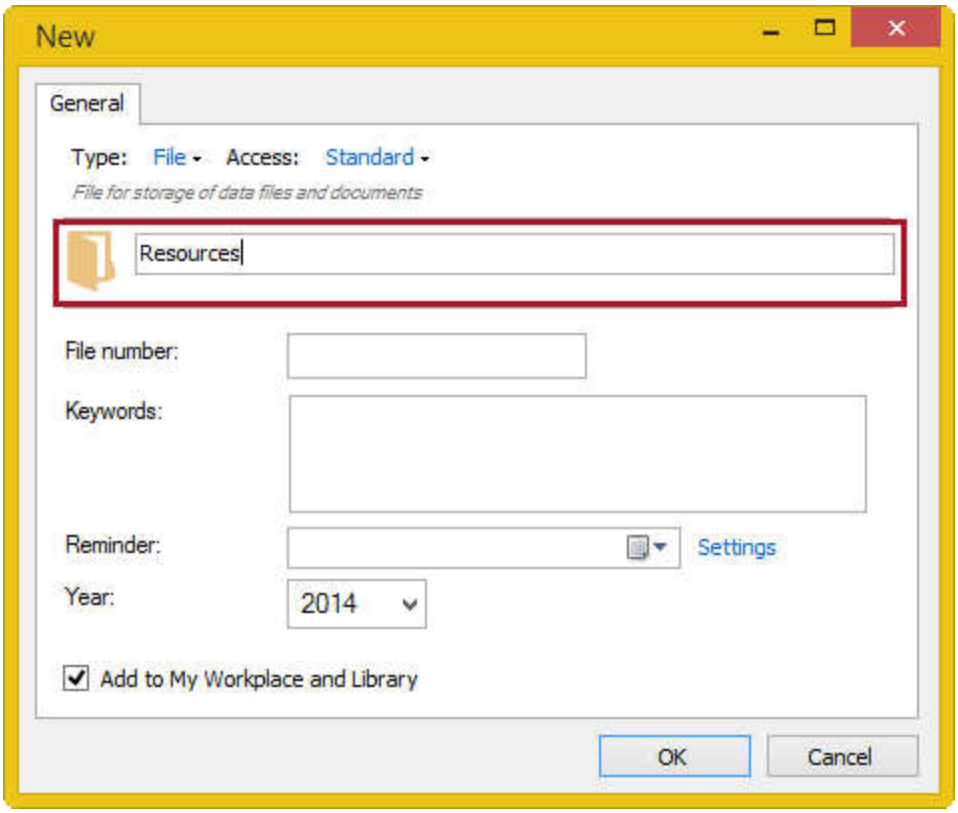
**Please note:**

The file types available will depend on your user permissions and on the solution being used.

1. Click on the **New File** icon or **right-click** on an empty area in the file pane and then click on the **New** option. Select the file type you want (e.g., file or personnel file).

   The **New** dialog box will appear.
2. Enter a **name** for the file. This is a mandatory field. The name you enter must be unique.

   The remaining properties are all optional.




Important: The following characters are not permitted in the name: * ? : < > \ /

Important: The properties will depend on the file type.

If the corresponding setting is configured, a file can be automatically added to the workplace and/or library when created. In the example above, the "**Add to My Workplace and Library**" option will add the file both to "My Workplace" and "My Library" (folder view).

Important: You can manage this option as required for your specific needs by

configuring the corresponding setting (please refer to the “Settings, configuring settings, Advanced, Import” section). Depending on the solution being used, this setting can be used to select the action you want (e.g., adding the file to My Workplace only, to My Library only, or to both) or to disable the option entirely.

Important: “My Library” will only be shown if the folder view is turned on.

3. If necessary, change the **Access:** setting for the file. The following options will be available: **Standard**, **Public**, **Confidential**, and **Only me**.

4. Click on **OK**.

   The file will be created and will then be shown in the file pane and, if applicable, in “My Workplace.”

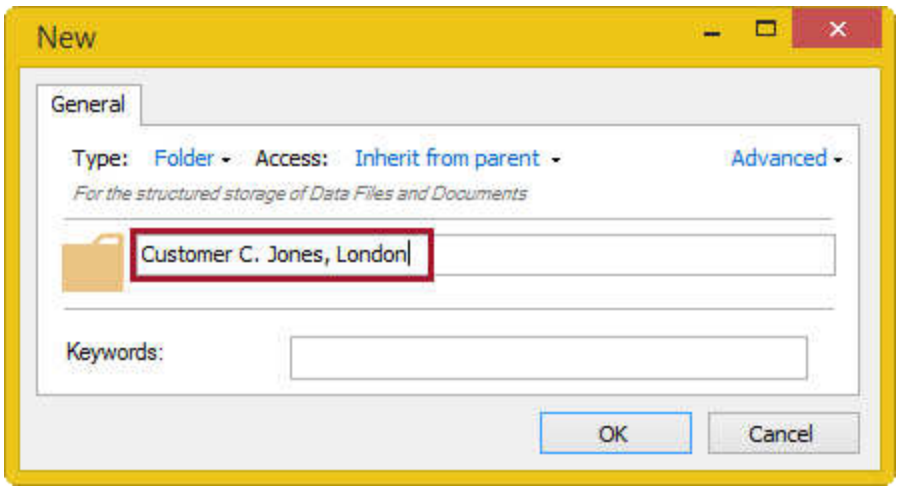
## 10.2 Creating registers

Registers can be used to subdivide a file or another register.

1. **Double-click** on the file or register to open it.
2. Right-click inside the document pane, click on **New**, and then click on **Register**.

   The **New** dialog box will appear.
3. Enter the **name** for the register. This is a mandatory field. The name must be unique within its hierarchy level.

   The remaining properties are all optional.




Important: The following characters are not permitted in the name:
* ? : < > \ / |

4. If necessary, change the **Access:** setting for the register. The following options will be available: **Standard**, **Public**, and **Confidential**. The default **Inherit from parent** option means that the access permissions that apply to the file will apply to the register as well.

5. To view or edit the file's properties, click on **Advanced**on the top right and then click on **Dossier Properties**.

6. Click on **OK**.

   The register will be created and will be shown in the document pane.

## 10.3 Opening a file / register

- **Double-click** on the file or register you want.

The file's / the register's contents will be shown in the document pane.

## 10.4 Deleting a file/register

You can delete selected files and registers. The files and registers will be deleted and the documents, computer files, and e-mails stored in them will be moved to the recycle bin and kept there until you permanently delete them. Links will be irrevocably (permanently) deleted.

**Please note:**

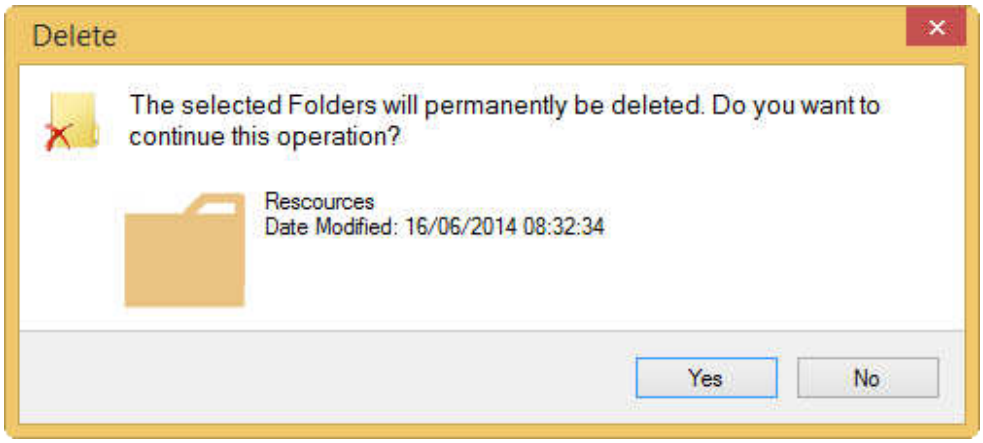
Whether or not the recycle bin is available will depend on the configuration being used. If it is not available, the items will be permanently deleted.

1. Select the item you want to delete.

   To select multiple items, hold down the **CTRL** key as you click on them.

2. **Right-click** and then click on the **Remove** option in the context menu or press the **DELETE** key.

3. Click on **Yes** in the prompt that appears.




## 10.5 Viewing / editing properties

You can view and modify the properties for a file or register.

1. **Right-click** on the file or register and then click on **Properties**.

   The **Properties** dialog box will appear.
2. Modify the properties as necessary and save the changes you made by clicking on **OK**.

**Shortcut:**

Click on the file / register and press **ALT+ENTER**.

## 10.6 Moving registers

You can move a register, together with its contents (documents and other registers), to another register within a file.

**Please note:**

Files cannot be moved, as they are already the topmost level in the storage hierarchy.

1. **Right-click** on the register and then click on **Cut**or use the **CTRL+X** shortcut.
2. **Right-click** on the target location and then click on **Paste**or use the **CTRL+V** shortcut.

**Shortcut:**

While in the document pane: Hold down the left mouse button and let the register “fall” into its target location (drag and drop it). The cursor will show a tool tip saying **Move to:** with the target location’s name.

## 10.7 Adding a file note

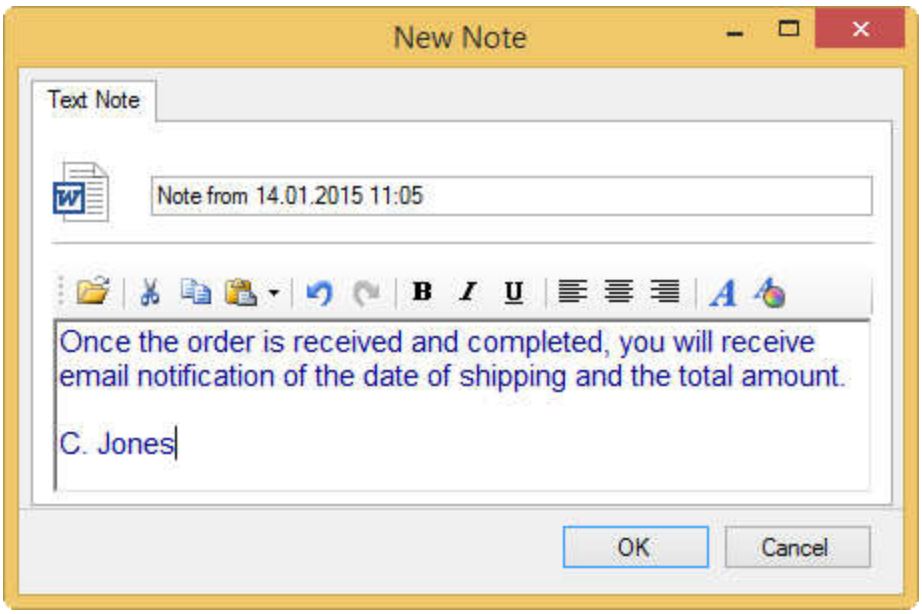
You can add additional information (the results from an agreement reached on the phone, for example) to a file or register in the form of a note. The file note will be stored as a Word document at the relevant level.

File notes are identified with a pin icon: Note from 24.06.2014 10:42

To search for file notes, use the document search like you would for any other document:

1. **Right-click** on the file and then click on **Add File Note**.

   Use the editor to write the note. You will be able to use the usual text formatting functions when typing your note.


New Note
Text Note
Note from 14.01.2015 11:05
Once the order is received and completed, you will receive email notification of the date of shipping and the total amount.
C. Jones
OK
Cancel

2. Click on **OK**.

   The dialog box used to enter properties will appear.

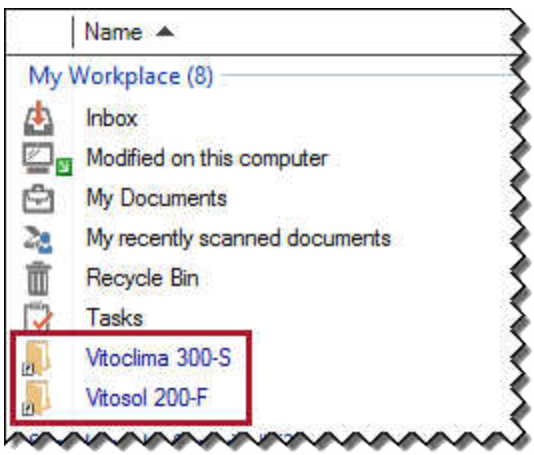
3. Enter any additional properties you want. Then click on **OK**.

## 10.8 Adding to my workplace

You can take the files you use on a regular basis and add them to your workplace in the form of links (shortcuts). This way, you can have important files and documents on hand without having to search for them.

- **Right-click** on the file in the file pane and then click on **Add to My Workplace**.

  An arrow icon on the lower left corner, together with the use of blue as a font colour, will indicate that the new item is a link.



**Tip:**

To delete the link, simply **right-click** on it and then click on **Remove from My Workplace**.

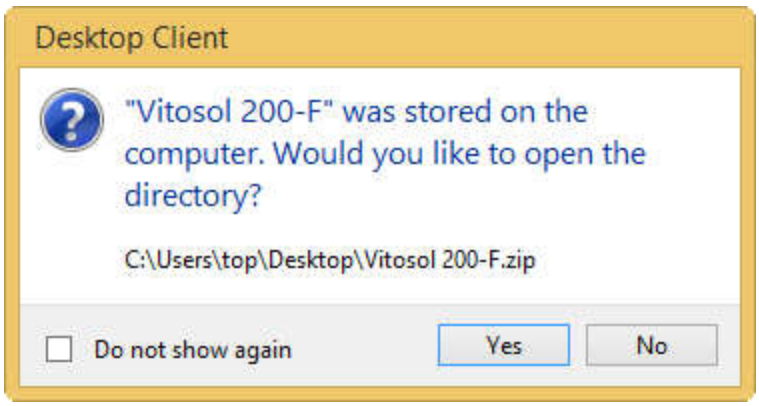
## 10.9 Saving externally

### 10.9.1 Saving in the filesystem

The function below saves a copy of a file or register, together with its contents (registers and documents), in the Windows folder structure outside the DMS.

1. **Right-click** on the file or register and then click on **Send to...**
2. Select:
   - **File or Folder** to save the file / register in the Windows folder structure
   - **Zip Archive** to save the file / register as a compressed ZIP file
3. Select a storage location and confirm.

   A prompt will appear asking you whether you would like to open the filesystem folder.


Desktop Client
"Vitosol 200-F" was stored on the computer. Would you like to open the directory?
C:\Users\top\Desktop\Vitosol 200-F.zip
Do not show again
Yes
No

4. If you click on **Yes**, the folder will be opened in Windows File Explorer. If you click on **No**, you will remain in doculife Desktop.

### 10.9.2 File as link

This function saves a link to the file / register in the Windows folder structure as an ***.ilnk** file outside the DMS. Double-clicking on the *.ilnk file will open the item in doculife Desktop.

1. **Right-click** on the file or register and then click on **Send to..., File as link**.
2. Select the location for the link and click on **OK**

   .

### 10.9.3 Saving as a link to the clipboard

In order for doculife Desktop to remain manageable for users, certain functions are only available in doculife WebClient (logs and audits, for example).

To open a register or document in doculife WebClient and work on it there, you can copy a weblink to the item to the clipboard and then paste it in your web browser's address bar.

- **Right-click** on the item and then click on **Send to..., Clipboard as Weblink**.

  Open your web browser and paste the weblink by pressing **CTRL + V**. doculife WebClient will start and open the item.

  Important: If you have not yet logged in to doculife WebClient, you will need to log in with your user information (account, username, and password).

## 10.10 Sending by e-mail

### 10.10.1 As a link

You can send a link to a file or register in the DMS by e-mail.

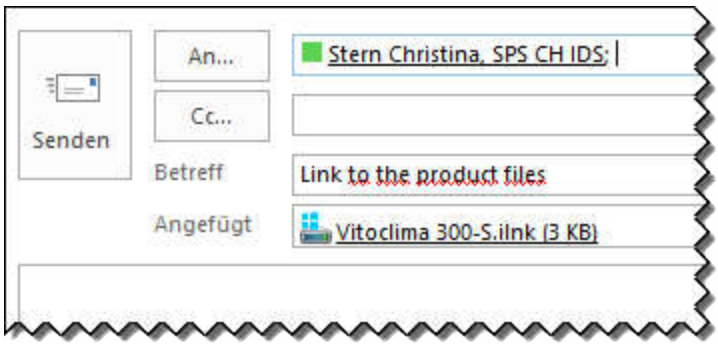
When the recipient clicks on the attachment, the file / register from the DMS will be shown or opened (based on how the corresponding settings are configured).

**Please note:**

Please note that the recipient must have the required access permissions for the file / register in order to be able to open the corresponding link.

- **Right-click** on the item you want and then click on **Send to..., Email Recipient as Link, As New Email**.

  The link will be added to a new e-mail in the form of an attachment (in *.ilnk format).

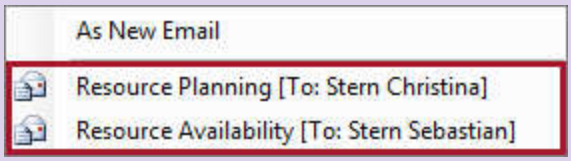



**Shortcut:**

Click on the **Send as Email** icon in the toolbar and then click on **Email Recipient as Link, As New Email**.

**Tip:**

To add the link to an e-mail that you have already written, select the e-mail from the choice list. All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”




### 10.10.2 As a weblink

You can send a weblink to an item by e-mail.

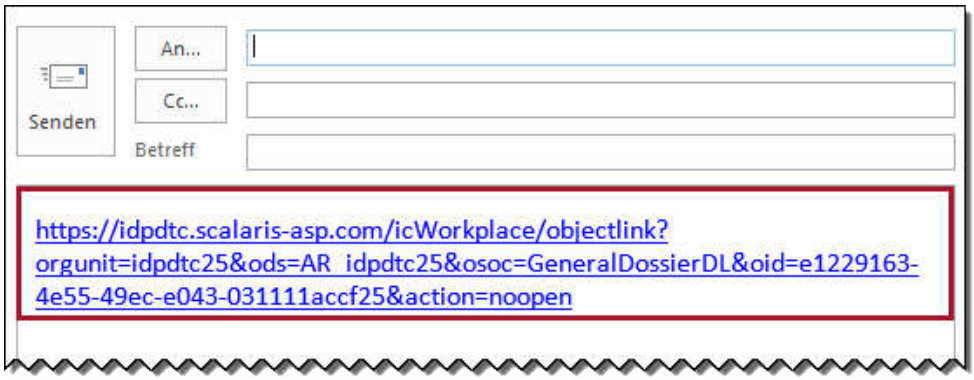
When the e-mail’s recipient double-clicks on the weblink, doculife WebClient will first be opened in their web browser. Before the recipient can view the item, however, they will have to log in to doculife WebClient.

**Please note:**

Please note that the recipient must have the required access permissions for the item in order to be able to open the corresponding weblink.

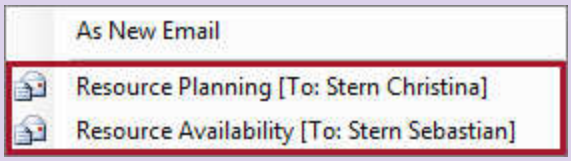
- **Right-click** on the item you want and then click on **Send to..., Email Recipient as Weblink, As New Email**.

  The weblink will be inserted in a new e-mail.




**Tip:**

To add the weblink to an e-mail that you have already written, select the e-mail from the choice list. All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”



## 10.11 Copying a file structure

### 10.11.1 What happens when you copy a file structure?

You can use this function to quickly and easily duplicate an existing file structure. This is an excellent way to save time and effort – especially if the file structure in question is very complex.

The file's entire structure will be copied and a new file with the same registers and properties will be generated.

The following elements are duplicated when copying a file structure:

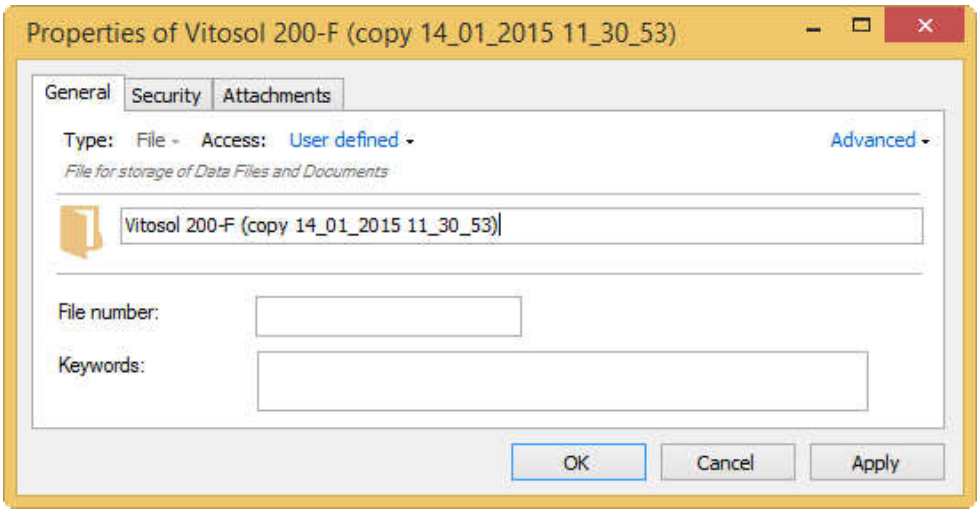
- All of the file's properties and access permissions
- All of the registers' properties and access permissions

### 10.11.2 Copying a file structure

You can create a new file that uses the structure and the access permissions of an existing file by duplicating the latter.

1. **Right-click** on the file with the structure you want to copy.
2. Click on the **Duplicate $(var.DossierNameUpper) (folder structure and permissions)** option.

   The file's properties will be shown. A suffix with the word "copy" and the date and time will be appended to the name.




3. Add or edit file properties as necessary.
4. Click on **OK**.

   The new file will be created and will then be shown in the file pane under **Other**.

# 11 Working with documents

## 11.1 Creating a new document

### 11.1.1 What types of documents can you create directly in the DMS?

You can use doculife Desktop to create new Microsoft Office documents directly in the DMS:

- Microsoft Word documents
- Microsoft Excel workbooks
- Microsoft PowerPoint presentations
- Microsoft Visio drawings
- Outlook e-mail messages: Once an e-mail is sent with Outlook, it will be automatically stored in the selected file / register.

On top of this, **all file formats** can be imported into the DMS.

### 11.1.2 New Microsoft Office document

You can create a new Microsoft Office document in the DMS.

**Please note:**

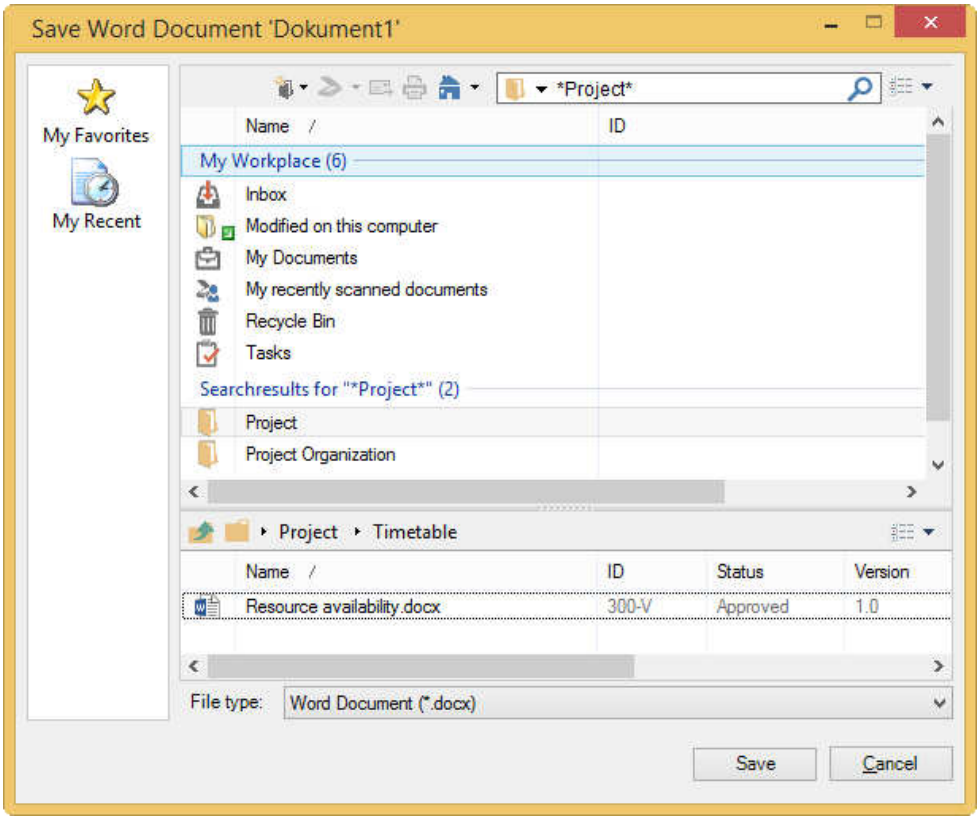
The Office integration feature must be enabled for the corresponding Microsoft Office program (please refer to the “Setting up / modifying the Office integration feature” section).

1. Open a file or register, **right-click** inside the document pane, and then click on **New**.
2. Select the document type you want (e.g., Word document).

   Important: The only Microsoft Office document types that will be available will be those for which the Office integration feature is enabled .

   A new document will be created and opened in the corresponding Microsoft Office program.
3. Create your document and, once you are done, click on the **Add** icon in the **doculife Desktop** ribbon.

The **Save** dialog box will appear.




The current storage location will already be selected.

4. Click on **Save**.

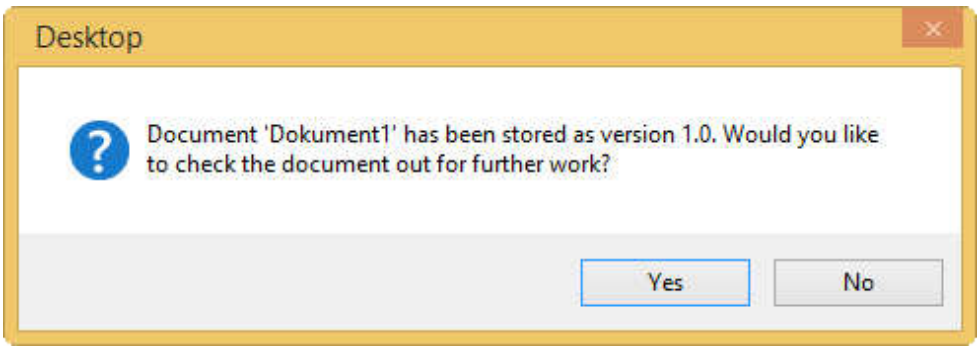
   The dialog box for defining the document's properties will appear.

5. Enter the document's name (at least) and then click on **OK**.

   The document will be checked in as Version 1.0.

   If you want to keep editing the document, keep it checked out by clicking on **Yes**.

   If you want to close the document and check it in instead, click on **No**.


Desktop
Document 'Dokument1' has been stored as version 1.0. Would you like to check the document out for further work?
Yes
No

### 11.1.3 New e-mail

You can write and send a new e-mail directly in the DMS.

**Please note:**

If you are running doculife Desktop in its own separate window, make sure that Outlook is also running.

1. Open a file or register, **right-click** inside the document pane, and then click on **New, E-Mail**.

   The Microsoft Outlook message form will appear.
2. Write your e-mail and send it.

   Once the e-mail is sent, a copy will be stored in the file / register you selected.

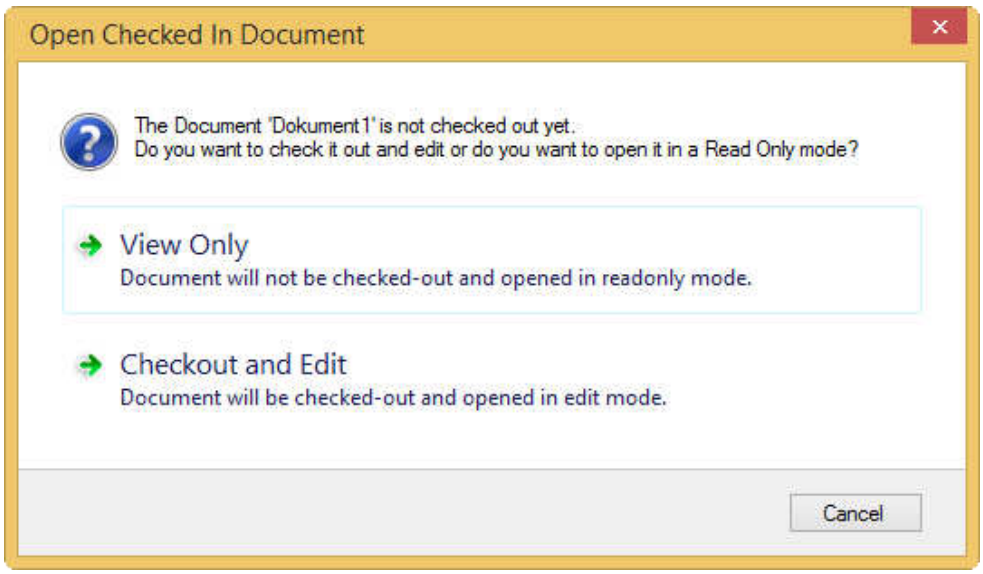
   Depending on the settings configured, the sent e-mail may then be deleted from the Sent Items folder in Outlook.

## 11.2 Opening documents

Documents are shown in the document pane, from where they can be opened.

- **Double-click** on the document you want in the document pane.

  Certain document types (e.g., Microsoft Word, Excel, PowerPoint) can be checked out directly when they are opened. The purpose of checking out documents is to ensure that a document cannot be edited by more than one person at the same time. In these cases, the following dialog box will appear:


Open Checked In Document
The Document 'Dokument1' is not checked out yet.
Do you want to check it out and edit or do you want to open it in a Read Only mode?
View Only
Document will not be checked-out and opened in readonly mode.
Checkout and Edit
Document will be checked-out and opened in edit mode.
Cancel

  Select:

  - **View Only** if you only want to read the document. The document will be opened in the appropriate application (in Microsoft Word, for example) in read-only mode.
  - **Checkout and Edit** if you want to edit the document. The document will be opened in the appropriate application (in Microsoft Word, for example). After editing it, you will have to check it back in.
  - **Cancel** if you want to cancel the process.

## 11.3 Checking documents out and back in

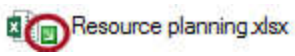
### 11.3.1 How do you work with documents in the DMS?

If you want to edit a document, you will first have to **check it out**.

The purpose of checking out documents is to ensure that a document cannot be edited by more than one person at the same time. In other words, only the person who has checked out the document will be able to edit it.

Checked out documents are identified with the icon (arrow on green background).

*Figure: Checked-out document*




For other users, a checked-out document will be identified with the icon (arrow on red background).

If you move your cursor over the document, a tool tip showing which user checked out the document will appear.

**Please note:**

A document's properties will also show who has checked out the document.

Checked out documents can be viewed in a variety of ways depending on the specific solution being used. For example, you can view documents that you have checked out **and** that are in progress in **My Workplace**, under **Modified on this computer** and checked out documents that are not in progress under **Tasks**.

Once you check out a document, you will be able to edit it and will then have to **check it back into** the DMS as a new version. The modified documents will not be available as a new version to other users in the DMS until you complete these steps.

The program features a version history functionality that is used to log all changes to a document in a detailed manner and that makes it possible to track who changed a specific document and when.

In other words, the following steps need to be carried out in order to edit a document:

1. Check out the document from the DMS
2. Edit the document
3. Check the document back into the DMS as a new version

## 11.3.2 How do you check documents out and back in?

The way in which a document needs to be checked out and back in will depend on the document format in question and on the program settings that have been configured.

Certain document formats can be checked out from the DMS when the document is opened (Microsoft Word documents, for example). Others need to be checked out manually (PDF documents, for example).

If the check-in reminder option is enabled, a check-in reminder will remind you to check in the changes you have made when you close a document.

When you check in a document, the checked-in document will automatically be incorporated as a new version. The DMS features a version control functionality that makes it easy to keep track of all of a document's versions.

The following sections go over how to check documents out and back in.

## 11.3.3 Checking out a document

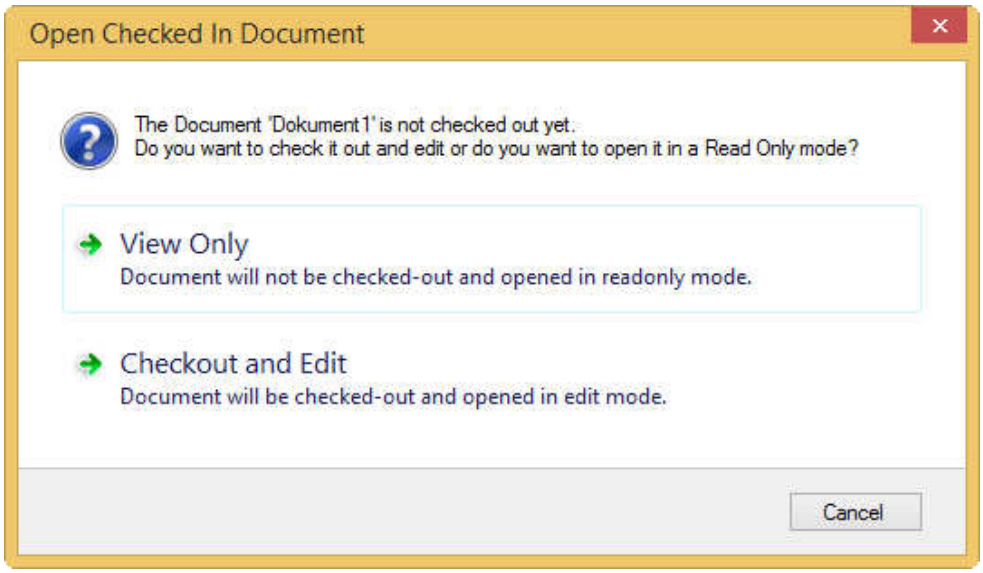
### 11.3.3.1 Checking out a document when opening it

**Please note:**

This function will only be available for certain document types (Microsoft Word, Excel, and PowerPoint, for example).

- **Double-click** on the document in the document pane.

  The **Open Checked In Document** dialog box will appear.


Open Checked In Document
The Document 'Dokument1' is not checked out yet.
Do you want to check it out and edit or do you want to open it in a Read Only mode?
View Only
Document will not be checked-out and opened in readonly mode.
Checkout and Edit
Document will be checked-out and opened in edit mode.
Cancel

  Select:

  – **View Only** if you only want to read the document. The document will be opened in the appropriate application (in Microsoft Word, for example) in read-only mode.

- **Checkout and Edit** if you want to edit the document. The document will be opened in the appropriate application (in Microsoft Word, for example). After editing it, you will have to check it back in.
- **Cancel** if you want to cancel the process.

#### 11.3.3.2 Checking out a document manually

Before you can edit a document in the DMS, you will need to check it out.

- **Right-click on the document** and then click on **Checking out**.

#### 11.3.3.3 Cancelling a checkout

Checkouts can be cancelled at any time. When a checkout is cancelled, none of the changes made to the document will be saved and the document will keep its last version number.

- **Right-click** on the checked-out document and then click on **Cancel Checkout**.

  Important: If you have made any changes to the document, a prompt will appear and warn you that these changes will be lost if you confirm.

**Alternatively: Cancelling a checkout using the Office add-in**

You can also cancel the checkout for an open document directly in the application (Microsoft Word, for example) by using the doculife Desktop ribbon.

- Click on the **Cancel Checkout** icon.

  Important: If you have made any changes to the document, a prompt will appear and warn you that these changes will be lost if you confirm.

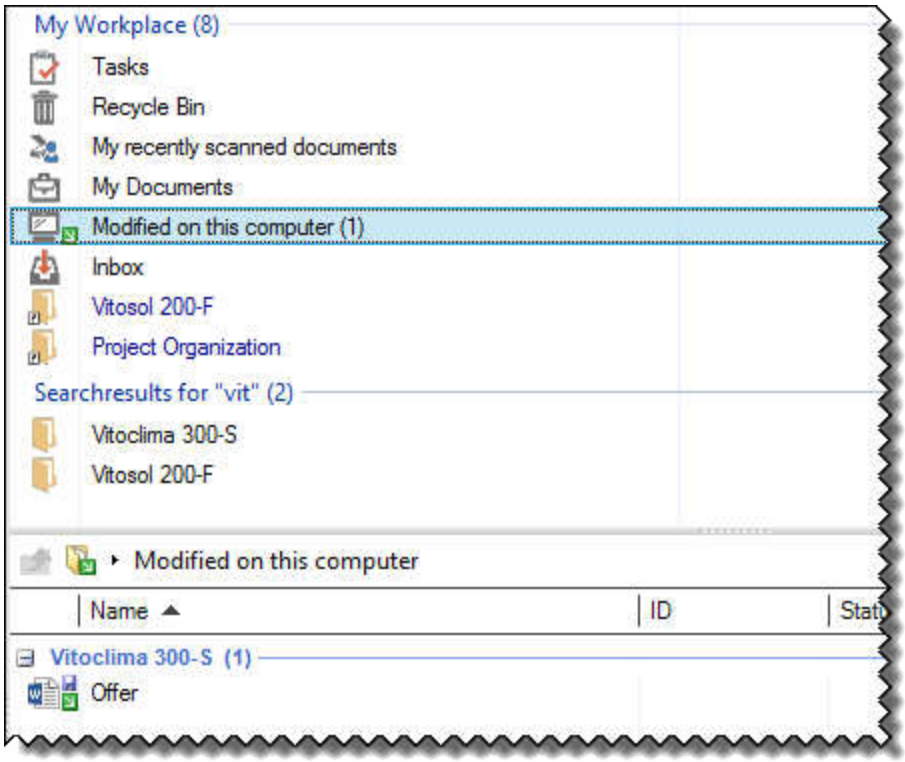
  The checkout will be cancelled and the document will be closed.

#### 11.3.3.4 Viewing checked out documents

**Please note:**

The specific steps required in order to view checked out documents will depend on the solution being used and on how the search folders for checked out documents are configured.

- To view checked out documents, go to My Workplace and **Modified on this computer.**




## 11.3.4 Checking in a document

### 11.3.4.1 Check-in without a reminder

This is the default setting.

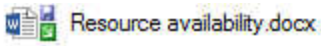
In other words, you will be expected to close an edited document and check it in later on or check it in before closing it by using the Office add-in.

**Please note:**

Check-in reminders can be enabled and disabled using the **Disable checkin reminders** option under **Settings**, **Advanced**, **Reminders**.

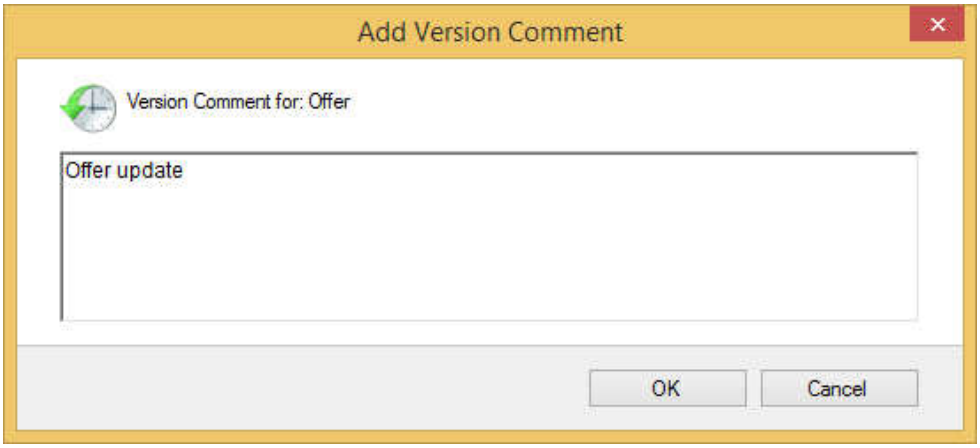
1. Save the document (e.g., **Save** icon in Microsoft Word).
2. Close the document.

   The checked-out document will be additionally identified with the **Save** icon.

3. **Right-click** on the checked-out document and then click on **Check In**.

   The **Add Version Comment** dialog box will appear.
4. You can enter a comment or simply leave the field blank (comments will make it easier to identify the version later on).




5. Click on **OK**.

**Alternatively: Checking a document in using the Office add-in**

You can check in a document (after editing it) directly in the Office application.

- In the**doculife Desktop** ribbon, click on the **Check In** icon and, if you want, enter a version comment.

The document will be closed.

### 11.3.4.2 Check-in reminders

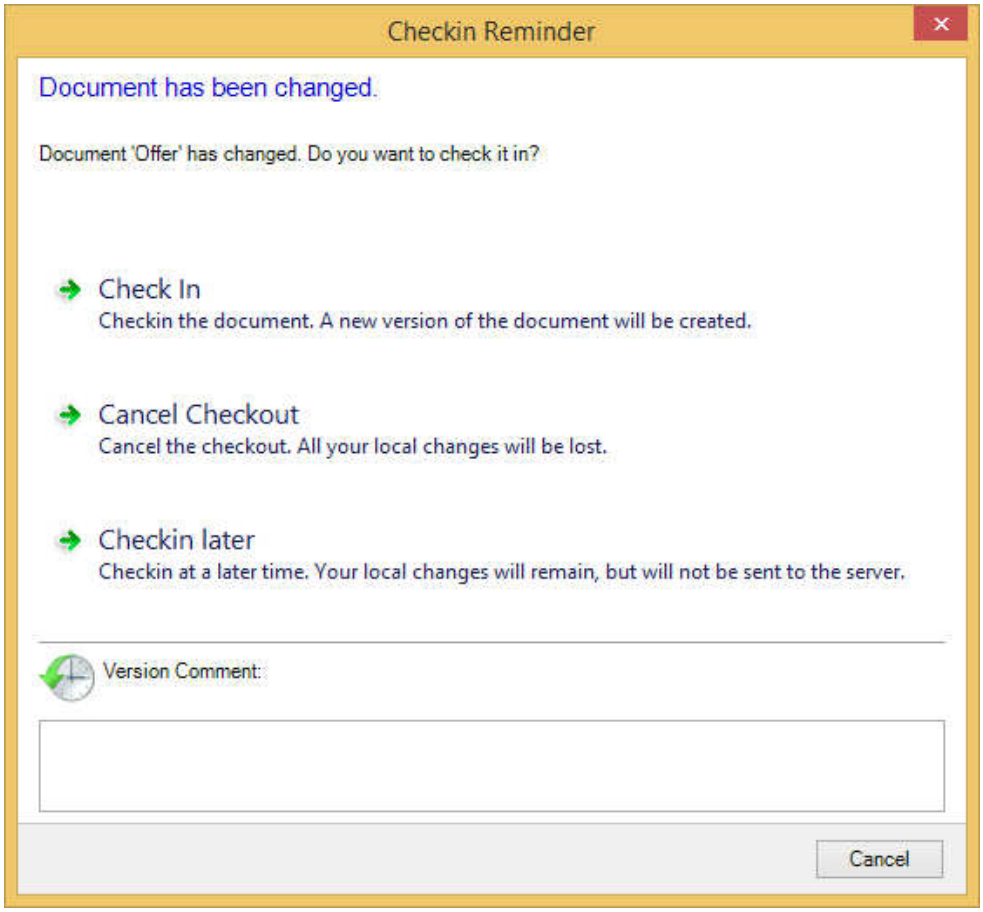
The purpose of check-in reminders is to remind you to check in the changes you have made when you close a document.

**Please note:**

Check-in reminders will only be shown if the **Disable checkin reminders** option is disabled under **Settings**, **Advanced**, **Reminders**.

1. Close the edited document in the application (Microsoft Word, for example).

   The **Checkin Reminder** dialog box will appear:


Checkin Reminder
Document has been changed.
Document 'Offer' has changed. Do you want to check it in?
Check In
Checkin the document. A new version of the document will be created.
Cancel Checkout
Cancel the checkout. All your local changes will be lost.
Checkin later
Checkin at a later time. Your local changes will remain, but will not be sent to the server.
Version Comment:
Cancel

2. Select:
   - **Check In** if you want to check in the document as a new version.

     If you want, you can add a comment for the new version into the **Version Comment** field before proceeding.

     Once you click on **Check In**, the document will be checked in and closed.
   - **Cancel Checkout** if you want to cancel the checkout.

     Important: Any changes you have made to the document will be lost!

     Once you click on **Cancel Checkout**, the document will be closed.
   - **Checkin later** if you do not want to check the document in yet.

     You can check the document in later on (by **right-clicking** on it and then clicking on **Check In**).

#### 11.3.4.3 Checking in a document that was edited outside the DMS

If you have edited a local copy of a document outside the DMS and want to overwrite the old version in the DMS, you can follow the steps below to do so.

1. Check out the document.
2. **Right-click** on the checked-out document and then click on **Update from File...**
3. Select the file you want in the filesystem and click on **Open**.

   A prompt will appear telling you that the document has been updated.
4. Click on **OK**.
5. **Right-click** on the document again and then click on **Check In**.

   The dialog box for entering a version comment will appear. You can enter a comment or simply leave the field blank (comments will make it easier to identify the version later on).
6. Click on **OK**.

**Tip:**

You can use this procedure to change a document's format (from XLSX to PDF, for example).

## 11.4 Moving documents

If you store a document in the wrong location, you can simply move it to the right file or register.

**Please note:**

When you move a document to a different file, the permissions corresponding to the new file will apply to the document.

1. **Right-click** on the document and then click on **Cut** or press **CTRL + X.**
2. Open the file or register to which you want to copy the document.
3. **Right-click** and then click on **Paste** or press **CTRL + V**.

**Tip:**

You can also move documents by **dragging and dropping** them.

## 11.5 Copying documents

If you need to, you can copy one or more documents.

**Please note:**

When you copy a document to a different file, the permissions corresponding to the new file will apply to the document.

1. **Right-click** on the document and then click on **Copy** or press **CTRL + C.**
2. Open the file or register to which you want to copy the document.
3. Right-click and then click on **Paste** or press **CTRL + V**.

   The **Properties** dialog box will appear.
4. Complete or edit the document's properties as necessary.
5. Click on **OK**.

**Tip:**

You can also copy documents by **dragging and dropping** them while holding down the **CTRL** key.

**Tip:**

Alternatively, you can also add a link to the document using the **Paste Shortcut** function.

## 11.6 Deleting documents

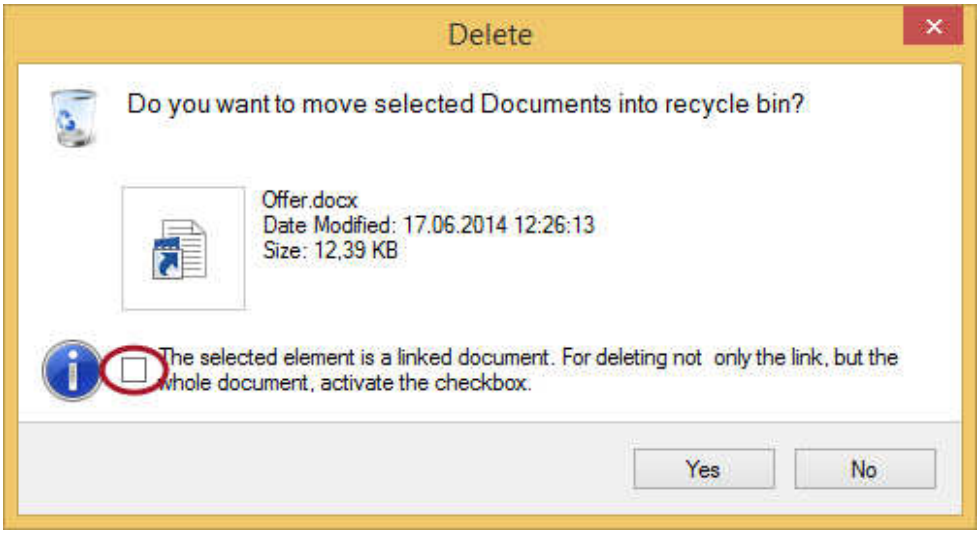
If you need to, you can delete one or more documents from the DMS. The deleted document will first be moved to the recycle bin, where it will be kept until you permanently delete it. This ensures that you will be able to restore any documents deleted by accident.

**Please note:**

Whether or not the recycle bin is available will depend on the configuration being used. If it is not available, the items will be permanently deleted.

1. **Right-click** on the document you want to delete and then click on **Delete** or press the **DELETE** key.

   If the selected document is a **link**, the **Delete** dialog box will show an additional option. If you want the link **and** the original document to be deleted, make sure to enable this option.


Delete
Do you want to move selected Documents into recycle bin?
Offer.docx
Date Modified: 17.06.2014 12:26:13
Size: 12,39 KB
The selected element is a linked document. For deleting not only the link, but the whole document, activate the checkbox.
Yes
No

2. Click on **Yes** in the prompt that appears.

   The document will be moved to the recycle bin.

   Important: Links will be permanently deleted instead of being moved to the recycle bin.

## 11.7 Printing documents

- **Right-click** on the document and then click on **Send to..., Printer...**

  The printer selection dialog box will appear, at which point you can select the printer you want to use.

**Tip:**

Click on the **Print** icon in the toolbar.

## 11.8 Opening a document in its original file

After a document search, the documents found will be shown in the document pane and the files in the file pane.

By using this function, you can specifically open the file or register in which a document is stored.

- **Right-click** on the document in the document pane and then click on **Open in Parent File**.

## 11.9 Link into workmap

By using this function, you can store a link to a document in a workmap in your workplace or in a new file.

This way, you can conveniently place documents in a “working file” without the documents being stored multiple times in the DMS.

1. **Right-click** on the document and then click on **Link into workmap**.

2. You will have the following options:
   - Select the file you want. All the files that you have added to your workplace will be available.

     Important: Added files will be shown in the choice list on top and will be identified by means of an arrow icon.
   - To create a new file, select the file type you want and enter the file's properties.

## 11.10 Full-text recognition on dragged and dropped files

In order to be able to use this function, the scanning integration feature must be enabled (please refer to the "Scanning documents" section).

This function is an extension of the "conventional" scanning function and enables users, for instance, to import PDFs and run full-text recognition on them (normally, full-text recognition would only be run when using conventional physical scanning).

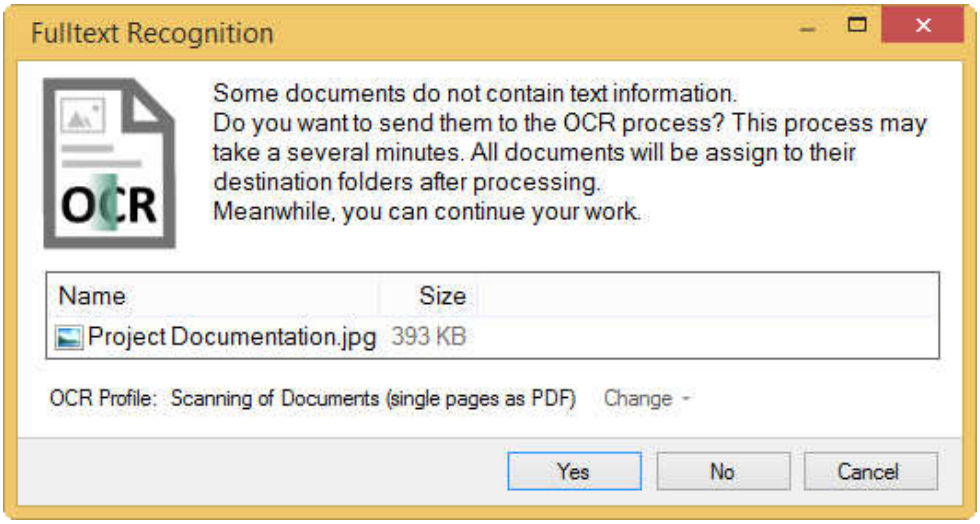
**Please note:**

Whether or not this function is available will depend on the configuration for your tenant. If you have any questions, please ask your administrator.

If you import a document into the DMS by dragging and dropping it and the document's file format is **PDF, JPG**, or **TIF** , the system will check whether the document contains text information and, if there is none, will ask if you want to run full-text recognition on it.

1. Select the document, hold down the **left mouse button**, and **drag & drop** the document onto the document pane.

   If the document does not contain any text information (as is often the case with scanned PDF files), the system will ask whether you want to run full-text recognition on the document. Otherwise, the dialog box used to enter the document's properties will appear immediately.


Fulltext Recognition
Some documents do not contain text information.
Do you want to send them to the OCR process? This process may take a several minutes. All documents will be assign to their destination folders after processing.
Meanwhile, you can continue your work.
Name
Size
Project Documentation.jpg
393 KB
OCR Profile: Scanning of Documents (single pages as PDF)
Change
Yes
No
Cancel

2. You can use one of the following methods:
   - Click on **Yes** to run the full-text recognition function. The system will show a message saying that full-text recognition is running in the background and that the document will be available in the DMS once the recognition process is complete.
   - Click on **No** to skip full-text recognition. The dialog box for defining the document's properties will appear.
   - Click on **Cancel** to cancel the import process.

## 11.11 Properties

### 11.11.1 What is a property?

Every document has a number of properties that are used to uniquely identify the document in the DMS. These properties make it possible to find a document in the DMS.

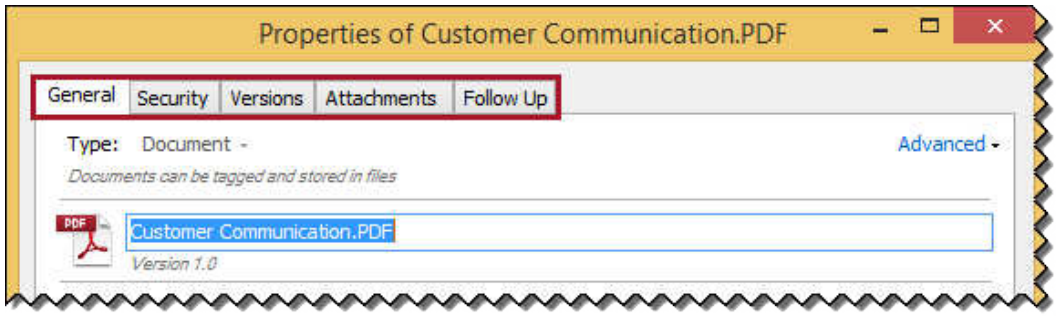
A document's general properties are defined when the document is created and can be modified later on. Properties set by the system, such as the author, the date of creation, and the date when the document was last modified, cannot be edited.

Each document's specific properties will depend on the document's type.

In addition to general properties, the dialog box for a document's properties features tabs that can be used to manage the following:

- Access permissions (Security)
- Versions
- Attachments
- Tracking (Follow Up)

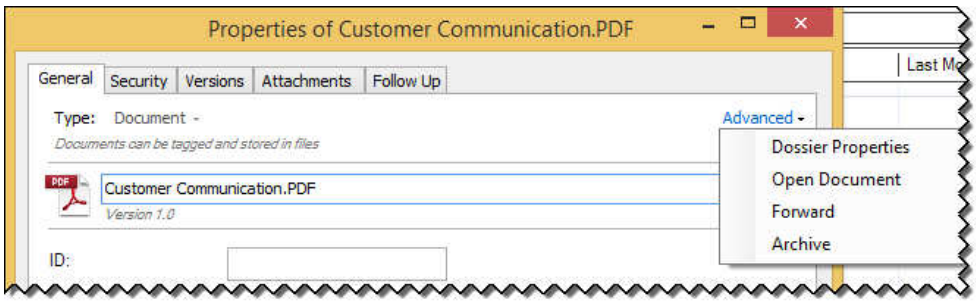
*Figure: Properties and additional settings*




### 11.11.2 Viewing properties

- **Right-click** on the document you want and then click on **Properties**.

  To view the properties of the corresponding file, click on **Advanced** and then click on the **Dossier Properties** option.




  The file's properties will be shown in a separate dialog box.

**Shortcut:**

You can also use the **ALT + ENTER** keyboard shortcut to view a document's properties.

**Tip:**

You can open the document from the Properties dialog box by clicking on the document icon next to the document name.

### 11.11.3 Editing properties

1. **Right-click** on the item you want and click on the **Properties** context menu option.
2. Edit the item's properties as necessary.

   Important: You will only be able to select editable fields.
3. Click on **OK**.

## 11.12 Saving externally

### 11.12.1 Saving in the filesystem

The function below saves a copy of a document as a computer file or as a zipped file in the Windows folder structure outside the DMS.

1. **Right-click** on the document and then click on **Send to...**.
2. Select:
   - **File or Folder** to save the document as a computer file
   - **Zipped File** to save the document as a compressed ZIP file
5. Select the directory where you want to save the document and change the filename if necessary.
6. Click on **Save**. A prompt will appear asking you whether you would like to open the file-system folder.

Desktop Client
"Vitosol 200-F" was stored on the computer. Would you like to open the directory?
C:\Users\top\Desktop\Vitosol 200-F.zip
Do not show again
Yes
No

7. If you click on **Yes**, the folder will be opened in Windows File Explorer. If you click on **No**, you will remain in doculife Desktop.

**Tip:**

To do this even more quickly, click on the document and drag it to Windows Explorer while holding the left mouse button down (**drag & drop**).

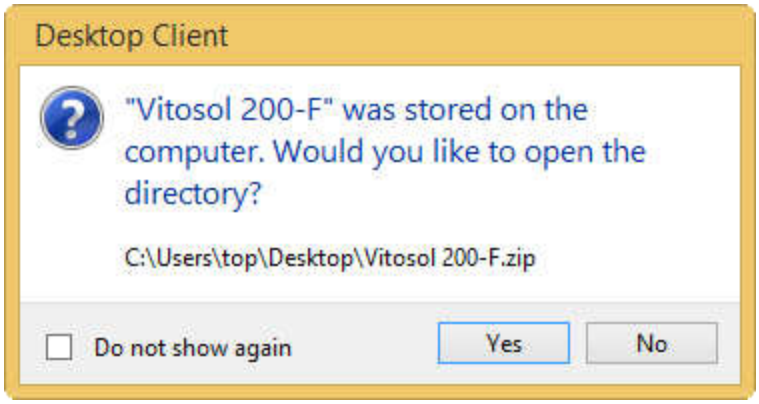
### 11.12.2 Saving as a link

This function saves a link to a document ( *.ilnk) in the Windows folder structure outside the DMS.

Double-clicking on the *.ilnk file will show the document in doculife Desktop.

1. **Right-click** on the document and then click on **Send to...**, **File as link**.
2. Select the directory where you want to save the document.
3. Click on **Save**.

   A prompt will appear asking you whether you would like to open the filesystem folder.


Desktop Client
"Vitosol 200-F" was stored on the computer. Would you like to open the directory?
C:\Users\top\Desktop\Vitosol 200-F.zip
Do not show again
Yes
No

4. If you click on **Yes**, the folder will be opened in Windows File Explorer. If you click on **No**, you will remain in doculife Desktop.

## 11.13 Sending by e-mail

### 11.13.1 As an attachment

You can send a copy of a document as an e-mail attachment.

**Please note:**

If the document is checked out, the latest (checked-in) version will be sent automatically.

- **Right-click** on the document and then click on **Send to..., Email Recipient, As New Email**.

  The Microsoft Outlook message form will be opened and the document will be added as an attachment.

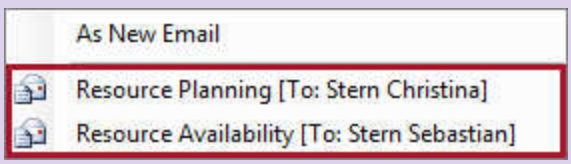
**Shortcut:**

Click on the **Send as Email** icon in the toolbar and then click on **Email Recipient, As New Email** or **drag and drop** the document onto the Outlook window or onto an open e-mail window.

**Tip:**

To add the attachment to an e-mail that you have already written, select the e-mail from the choice list.

All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”



### 11.13.2 As a link

You can send a link to a document in the DMS by e-mail.

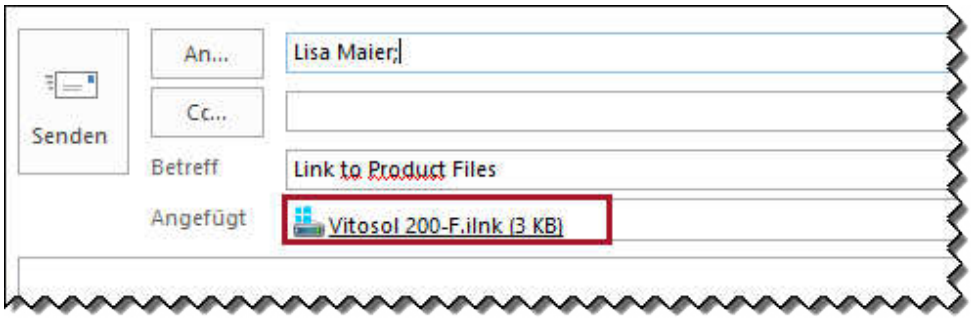
When the recipient clicks on the attachment, the document from the DMS will be shown or opened (based on how the corresponding settings are configured).

**Please note:**

Please note that the recipient must have the required access permissions for the document in order to be able to open the corresponding link.

- **Right-click** on the document you want and then click on **Send to..., Email Recipient as Link, As New Email.**

  The link will be added to a new e-mail as an attachment (***.ilnk**).



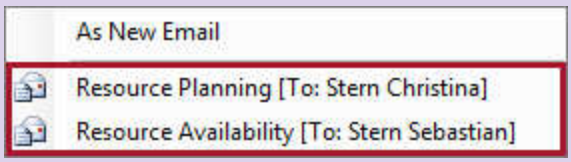

**Shortcut:**

Click on the **Send as Email** icon in the toolbar and then click on **Email Recipient as Link, As New Email**.

**Tip:**

To add the link to an e-mail that you have already written, select the e-mail from the choice list.

All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”




### 11.13.3 As a weblink

You can send a weblink to an item by e-mail.

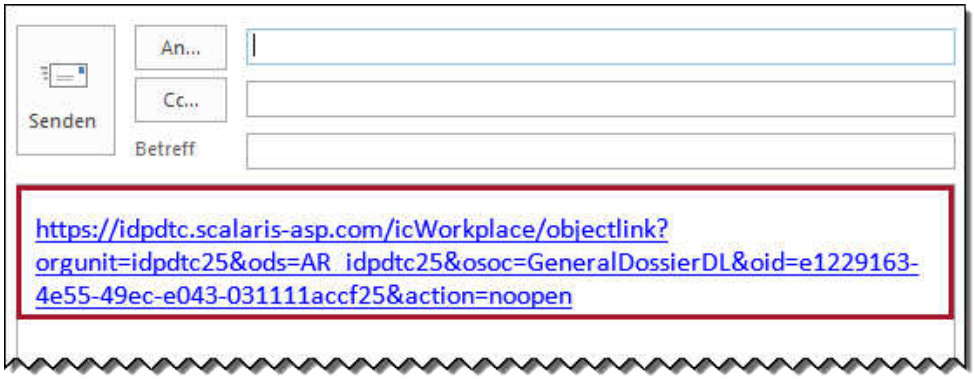
When the e-mail’s recipient double-clicks on the weblink, doculife WebClient will first be opened in their web browser. Before the recipient can view the item, however, they will have to log in to doculife WebClient.

**Please note:**

Please note that the recipient must have the required access permissions for the item in order to be able to open the corresponding weblink.

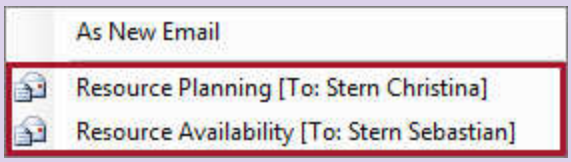
- **Right-click** on the item you want and then click on **Send to..., Email Recipient as Weblink, As New Email**.

  The weblink will be inserted in a new e-mail.




**Tip:**

To add the weblink to an e-mail that you have already written, select the e-mail from the choice list. All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”




## 11.14 Links to documents

### 11.14.1 What is a link?

If you want to store a document in multiple locations without having the document be saved multiple times in the DMS, you can simply store it in the form of a link (commonly referred to as a “shortcut” as well).

The document being linked will remain in its original storage location.

If you paste a link in a new file, the permissions that apply to the corresponding document will still be the permissions for its original storage location.

When you search for a document, only the original document will be shown in the search results; in other words, links to it will not be shown. The reason for this is that it prevents search results from becoming “bloated” due to links.

If you delete the original document, all links to the document will be deleted as well. This ensures consistency throughout the entire system.

### 11.14.2 Creating links

You can paste a document to a different file or register in the form of a link (shortcut).

1. **Right-click** on the document you want and then click on **Copy** or use the **CTRL+C** shortcut.
2. Go to the target location, **right-click**, and then click on **Paste Shortcut**.

   Important: If you paste the link to a **different file**, an **arrow will be added to the lower left corner** of the document icon: .

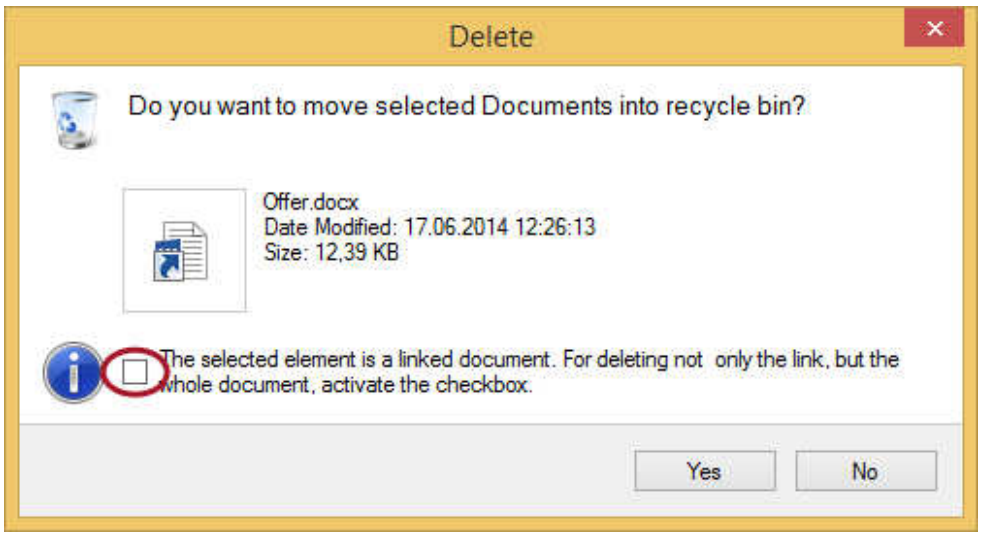
   If you paste the link **within the same file** or to My Documents, the document icon will remain the same.

### 11.14.3 Deleting a link

You can delete a link by itself or the link together with the corresponding original document (provided you have the necessary permissions).

1. **Right-click** on the link you want to delete and then click on the **Delete** option or press the **DELETE** key.

   The **Delete** dialog box will appear.
2. You will have the following options:
   - **Deleting the link only:** No further action required. Click on **Yes** in the prompt that appears.
   - **Deleting the link and the original document:** Enable the "**The selected element is a linked document. For deleting not only the link, but the whole document, activate the checkbox**" option and click on **Yes**.


Delete
Do you want to move selected Documents into recycle bin?
Offer.docx
Date Modified: 17.06.2014 12:26:13
Size: 12,39 KB
The selected element is a linked document. For deleting not only the link, but the whole document, activate the checkbox.
Yes
No

Important: Links will be permanently deleted instead of being moved to the recycle bin.

## 11.15 Importing documents (computer files)

### 11.15.1 How do you import a computer file?

To import computer files, you can simply **drag & drop** them from Windows File Explorer. All file formats can be imported.

If you import multiple files at once, you can choose to either define the properties for each one individually (individual indexing) or for all the files in general (group indexing):

- Import using **individual indexing**
  Properties need to be defined for each file individually. The filenames are used automatically.
- Import using **group indexing**
  The properties are defined once for all files. The filenames are used automatically. This is the method that will be used if you import multiple files from Windows File Explorer by dragging and dropping them.

**Please note:**

The maximum number of documents that can be imported is 100. The maximum total file size that can be imported is 100 MB.

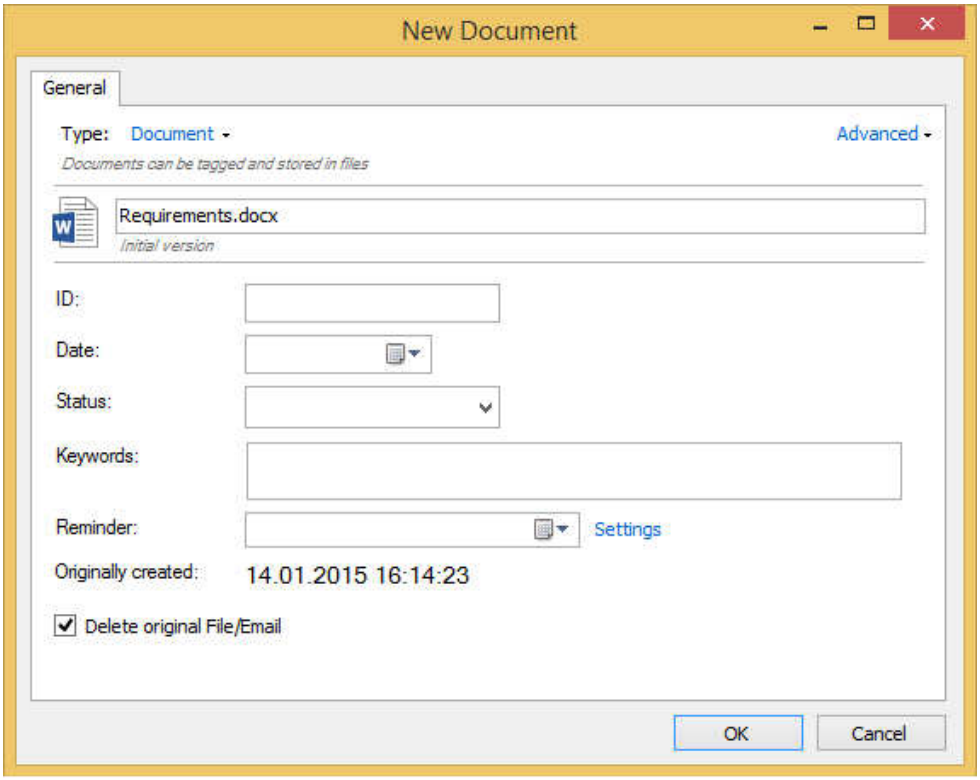
### 11.15.2 Importing computer files (individual indexing)

Use individual indexing if you want to import multiple computer files from the Windows file-system and define the properties for each one individually.

1. **Right-click** inside the document pane and then click on **Import, Documents from File...**
2. Select the computer files you want to import (to select multiple files, click on them while holding down the **CTRL** key).
3. Click on **Open**.

   The dialog box used to define properties will appear.

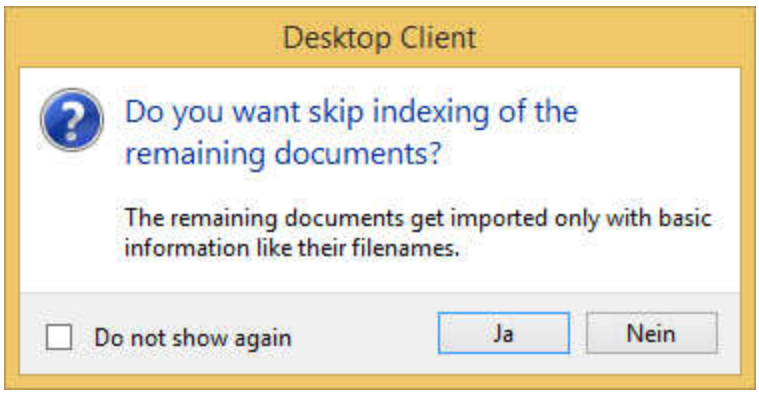
   The filename will be used as the title for the document by default.




4. Enter the document's properties.

   If you want the original file to be deleted once you are done, enable the **Delete original File/Email** option

5. You can use one of the following methods:
   - **OK:** Imports the current file and shows the properties for the next file.
   - **OK all:** Imports the current file with the properties you defined. The remaining files will be imported with the filename. Click on **Yes** in the following prompt:


Desktop Client
Do you want skip indexing of the remaining documents?
The remaining documents get imported only with basic information like their filenames.
Do not show again
Ja
Nein

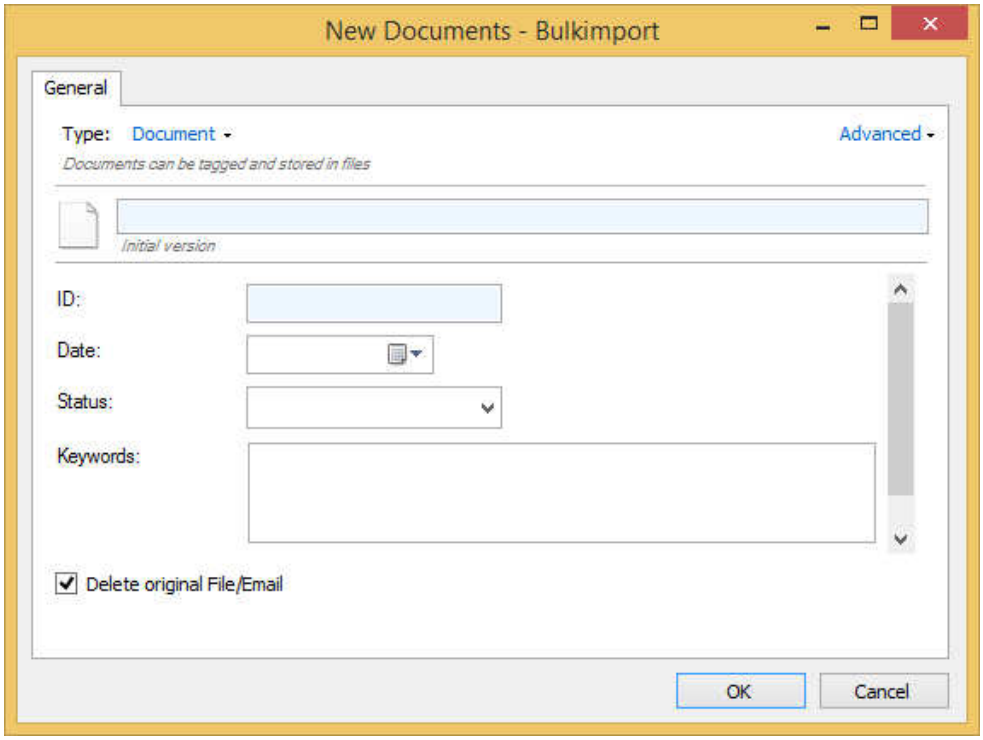
   - **Cancel all:** Cancels the import process for all the files that have not yet been imported.
   - **Cancel:** Cancels the import process for the current file and shows the properties for the next one.

### 11.15.3 Importing computer files (group indexing)

Use group indexing if you want to import multiple computer files from the Windows file-system and use the exact same properties for all of them.

1. **Right-click** inside the document pane and then click on **Import, Bulk Import Files...**
2. Select the computer files you want to import (to select multiple files, click on them while holding down the **CTRL** key).
3. Click on **Open**.

   The dialog box used to define properties will appear.




4. Enter the properties you want. These properties will apply to **all** the documents being imported.

   Important: If you leave the title empty, the filename will be automatically used as a title. If you change the title, it will be changed for all the documents.
5. If you want the original file to be deleted once you are done, enable the **Delete original File/Email** option.
6. Start the import process by clicking on **OK**.

**Shortcut:**

**Drag and drop** the files from Windows Explorer onto a file in the file pane or onto the document pane.

## 11.16 Forwarding documents (agile workflow)

### 11.16.1 What is forwarding?

Forwarding is a useful function for teamwork and makes it possible to initiate an agile workflow for a document.

Recurring workflows can be saved as templates so that they will be readily accessible.

You can forward a document, together with instructions, to a user or user group for revision, review, or approval. Forwarded documents will be moved to the user's / group's inbox.

**Example:**

The project manager forwards a non-disclosure agreement to the data protection officer for review. Once the data protection officer is done reviewing the document, they forward it to the admin (group) for storage.

**Please note:**

When a document is forwarded, it is moved from its current storage location to the relevant inbox. Files and registers cannot be forwarded.

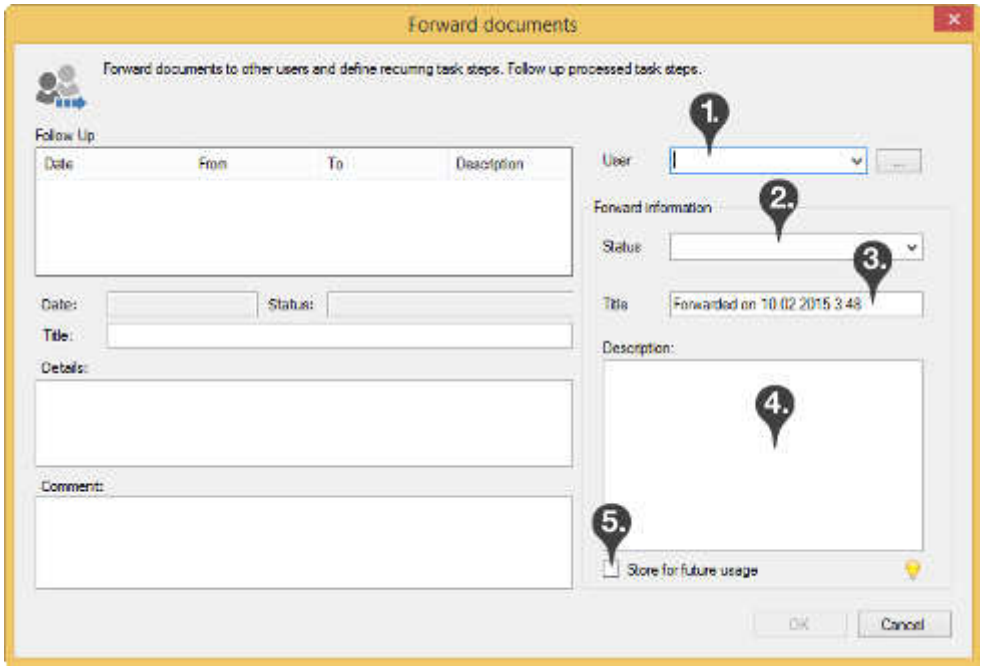
You can use the "Follow Up" function to see the workflow through which the document has already gone, as well as any instructions specified for the document.

### 11.16.2 Forwarding documents

You can forward documents to individual users' or user groups' inboxes (personal inboxes or group inboxes).

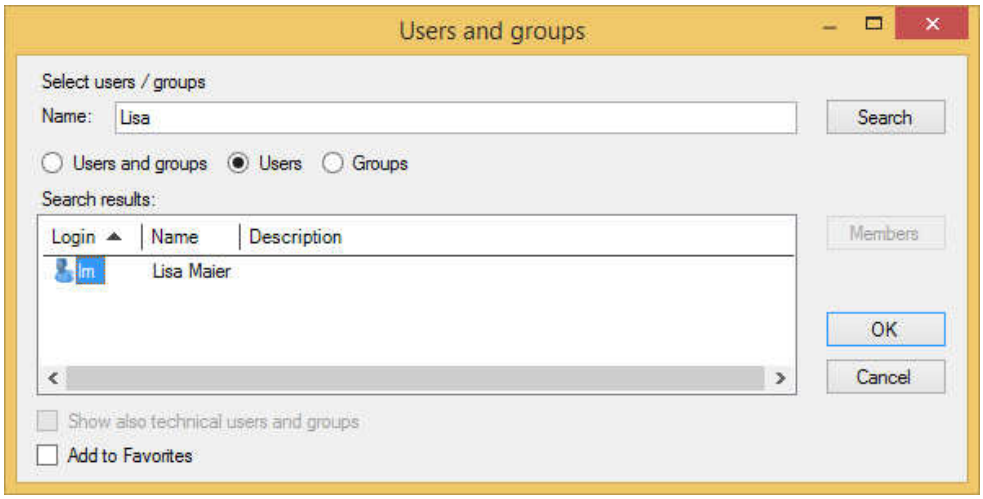
1. **Right-click** on the document and then click on **Forward, Advanced...**.

   The **Forward documents** dialog box will appear.




2. First, specify the **user** (1) to whom you want to forward the document.

   Click on the **...** button to search for a user or group




   If there is a user or group that you use frequently, enable the **Add to Favourites** option to add them to the choice list next to “User.”

3. Specify the document’s current **status** (2).
4. Enter a **title** (3) for the forwarding action. The date and time will be suggested as a title.
5. Enter a **description** (4) in order to explain the task to the user.

6. If you will be using the exact same forwarding action frequently (same user, same task), you can save it as a template. If you do this, it will be available in the context menu, under **Forwarder**, in the future. Simply click on the **Store for future usage** (5) option.
7. Click on **OK**.

   The document will be taken from its current storage location and moved to the user's / user group's inbox.

**Tip:**

If you want to save the forwarding action as a template (see step 4), it is recommended to enter a unique and clear title for it so that you will be able to easily identify it later on.

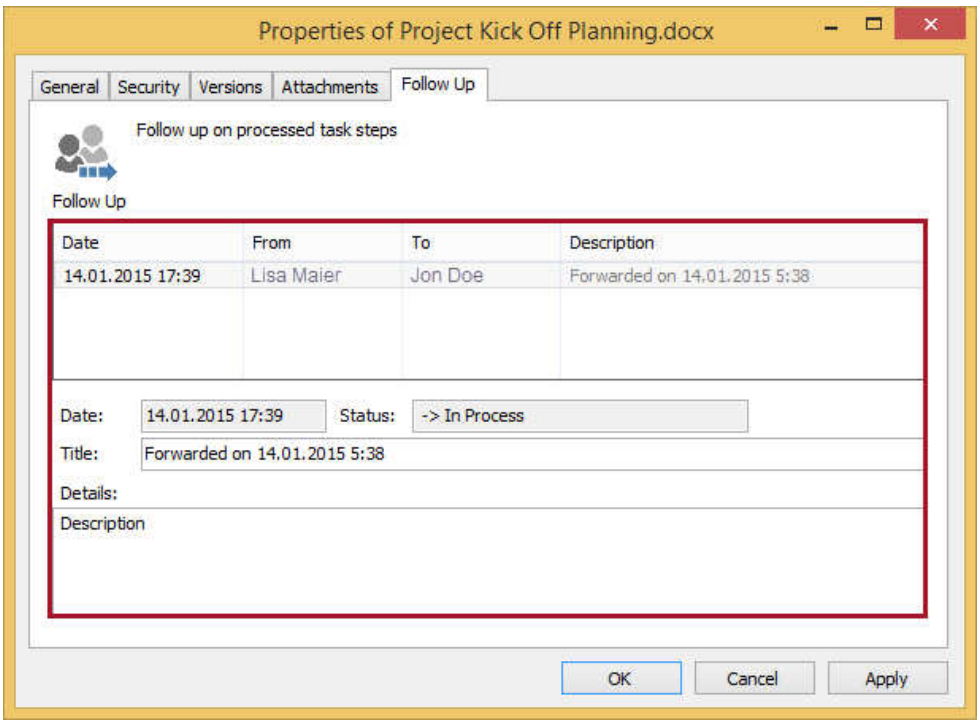
### 11.16.3 Tracking forwarded documents

Forwarded documents will be delivered to your inbox / group inbox. By checking the document's "Follow Up" properties, you can see which task has been assigned to you for the document, as well as the workflow through which the document has gone so far.

1. **Right-click** on the document in the inbox and then click on **Forward**, **Follow Up**.

   The overview that appears will show the date, sender (From), and recipient (To), as well as the title of the forwarding action.

   In addition, it will show the forwarding steps through which the document has already gone (each line is a forwarding step).



2. To see the description that the sender entered for the forwarding action, click on the forwarding action in the list. The description will be shown inside the **Details** field below the list.

**Tip:**

You can remove an edited document from the inbox by **cutting**and **pasting** it to a file or register in order to store it in the latter.

# 12 Working with libraries (folder view)

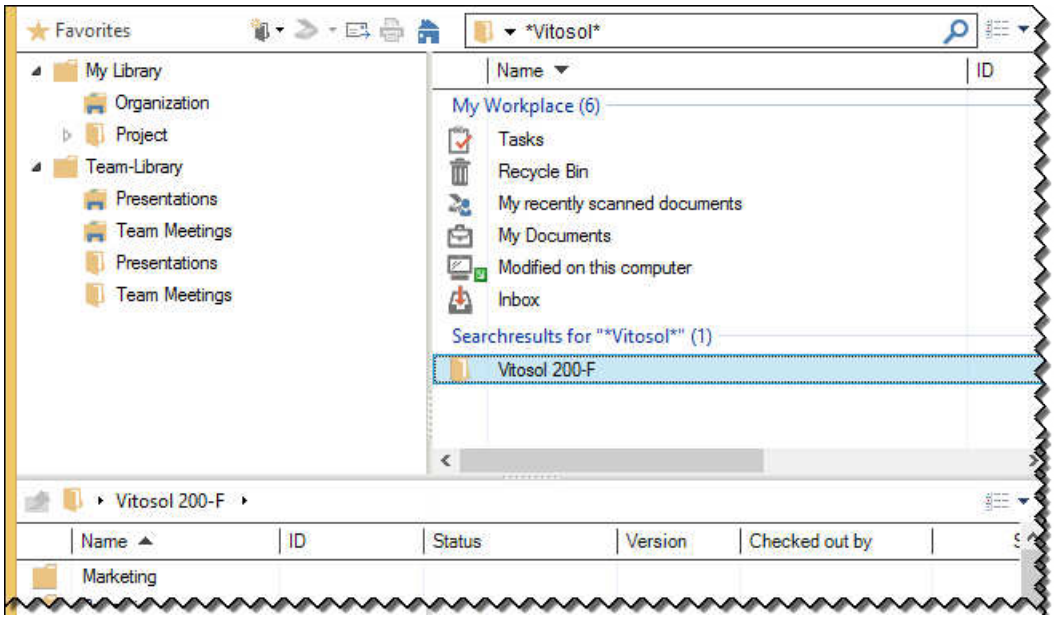
## 12.1 What are libraries?

You can use libraries to “organize” and virtually structure your repository, much like with the libraries used in Microsoft Windows 7. You can use these libraries to group storage locations and show them in a tree structure. In other words, you can map hierarchical structures just like the ones commonly used in Windows Explorer.

When using libraries, all files, registers, and documents will be left in their original storage locations. In other words, no documents are saved in a library. Instead, the library contains a “virtual” structure (a “view”) that can be used to easily manage files / registers and their contents. Just like in Windows Explorer, you can drag and drop documents to quickly move or sort them within the tree structure.

Whenever you delete or add files, registers, or documents from/to the DMS, the corresponding library will be updated automatically.

*Contents of My Library with (library) folders and files:*




Following are some of the actions that can be carried out with libraries:

- **Creating a new library**: You can create new libraries for various purposes. The system might already provide one or more libraries (“My Library,” for example) depending on the solution being used.
- **Sharing a library:** You can share libraries with your co-workers and/or with groups. This is an efficient way to easily make information available to others. However, please note that sharing requires specific permissions.

- **Categorizing (optional):** Depending on the solution being used, it may be possible to use “categories” (icons, colours) to highlight and visually organize libraries and (library) folders.

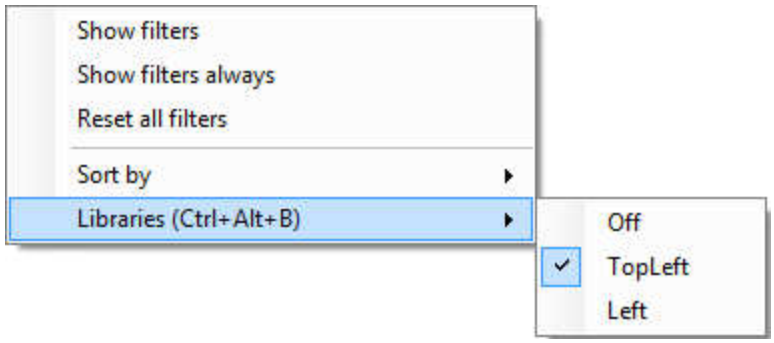
  *Library and folder with category (icon):*

- **Creating files, registers, and documents:** The folder view can be used to create new objects in the DMS.

## 12.2 Showing/hiding libraries

You can use libraries to organize your files and registers and manage them in a hierarchical structure. Libraries can be displayed on the upper left or to the left of My Workplace.

1. Click on the **Customize folder view** icon in the toolbar.
2. Go to **Libraries** and select the position you want (**TopLeft** or **Left**) or select **Off** to hide the libraries.




**Tip:**

Press**CTRL+ALT+B** to quickly show and hide the libraries.

## 12.3 Adding files and registers to a library

You can add entire files and registers to a library. (adding standalone documents is not supported).

A library can be organized using libraries and (library) folders.

There are various options for adding a file / register to the library:

- **New file:** When you create a new file, enable the **Add to My Workplace and Library** option. The file will be automatically added to your default library.

  Important: The solution configuration being used and the settings you configure will determine whether this option will be available.
- **Drag & drop:** Drag the file / register to the library you want.
- **Sending to libraries: Right-click** on the file / register and then click on **Send to..., Libraries**. The file / register will be automatically added to the **My Library** library.

**Tip:**

To change the order of files / registers within the library or move the files / registers to a different library, simply **drag and drop** them.

**Tip:**

As usual, you can also store documents in a file / register by **dragging and dropping them** onto the file / register in the library view.

**Tip:**

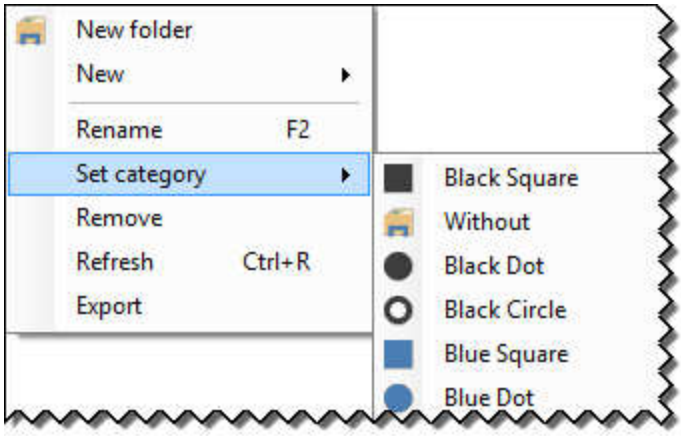
In addition to files and registers, you can also add special objects (such as My Documents, Inboxes, and Search Folders) to the library.

## 12.4 Adding and categorizing libraries

You can use a library to organize your repository with a tree structure. Depending on the solution you are using, there may already be default libraries available. On top of this, you can create your own libraries.

If the corresponding settings are configured as required, you will be able to assign categories (colours, icons) to libraries (depending on the solution being used).

1. **Right-click** on an empty area inside the folder pane and then click on **New library**.
2. Enter the name for the library and press **ENTER**.
3. If configured: Now **right-click** on the library and then select the category you want (colour, icon) under **Set category**. To reset the category, select the “Without” option.



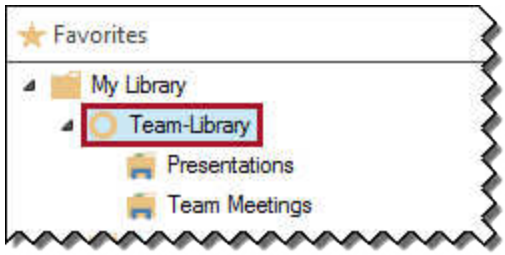

## 12.5 Creating and categorizing folders

A (library) folder is a structure element that can be used to further organize the folder view into a hierarchy. Folders work much the same way as folders in the Windows filesystem do. In contrast to files, folders do not have any index values and cannot be searched for.

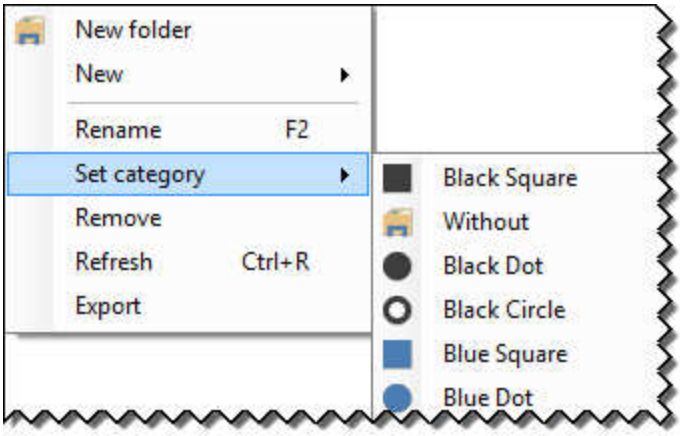
Libraries can be organized using (library) folders. A folder, in turn, can contain additional folders, as well as files and registers.

If the corresponding settings are configured as required, you will be able to assign categories (colours, icons) to folders (depending on the solution being used).

*Library with a "Presentations" folder:*




1. **Right-click** on the library or folder and then click on **New folder**.
2. Enter the name you want and press **ENTER**.
3. If configured: Now **right-click** on the folder and then select the category you want (colour, icon) under **Set category**. To reset the category, select the "Without" option.



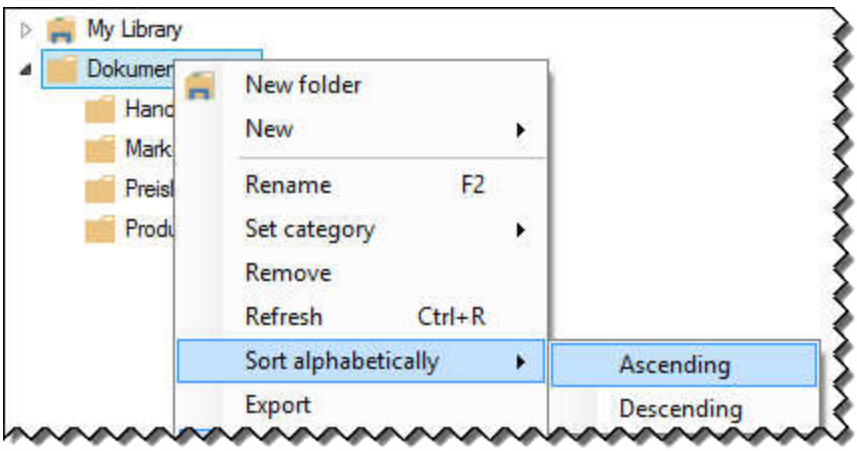

**Tip:**

To change the order of folders, simply **drag and drop** them.

## 12.6 Sorting in libraries

You can sort a library's contents alphabetically in ascending or descending order.

1. **Right-click** on the structure element with the contents you want to sort.
2. Select **Sort alphabetically** and then click on **Ascending** or **Descending**.




## 12.7 Removing a library / folder

You can delete a library / folder from the folder view at any time. The files / registers or folders under the library / folder being deleted will also be removed from the view.

Since the libraries / folders are virtual structures, the actual files and registers, as well as the documents they contain, will remain in the DMS in their original storage location.

- **Right-click** on the library / folder and then click on **Remove** or press the **DELETE** key.

  Confirm the deletion prompt.

## 12.8 Removing a file / register

You can remove files and registers from the folder view at any time. Since the folder view is a virtual structure, the actual files and registers, as well as the documents they contain, will

remain in the DMS in their original storage location.

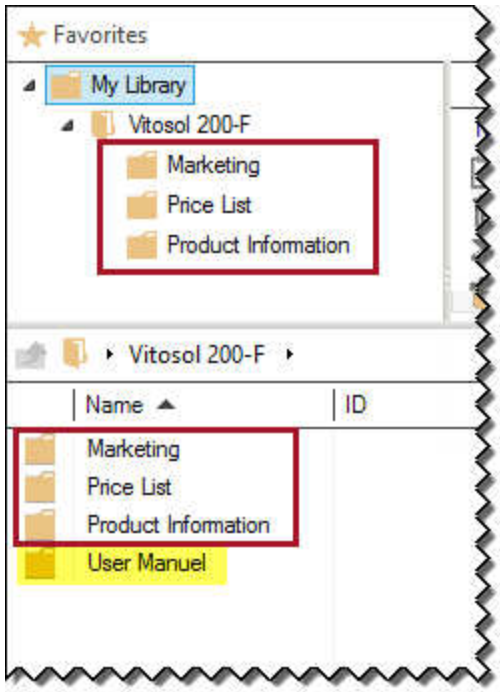
If you delete any files or registers from the DMS, they will be automatically removed from your library/folder.

- **Right-click** on the file / register and then click on **Remove** or press the **DELETE** key.

## 12.9 Hiding registers

To keep a library's structure easy to follow, you can hide individual registers within a file. When you do so, the registers will not be listed in the folder view and will only become visible when you open the file.

*Example: The hidden "User Manual" register is not listed in the library.*




- **Right-click** on the register inside the library and then click on **Hide**.

  Important: To show all hidden registers again, you can click on **Refresh**.

## 12.10 Creating files, registers, and documents

The folder view can be used to create new objects in the DMS.

### Creating a file

You can create new files at the library or (library) folder level.

- **Right-click** on the library or folder and then click on **New, File**.

  Enter the properties you want and click on "OK" to confirm.

### Creating registers or documents

You can create new registers or documents at the "file" level.

- **Right-click** on the file and then click on **New, Register** or the **document type** you want (Word document, for example).

## 12.11 Updating a library

Libraries are updated and checked for changes in the DMS when doculife Desktop is started, as well as automatically at specific intervals. This interval can be configured in a solution-specific manner. The library can also be refreshed manually, making it possible to view changes immediately.

### Update automatically

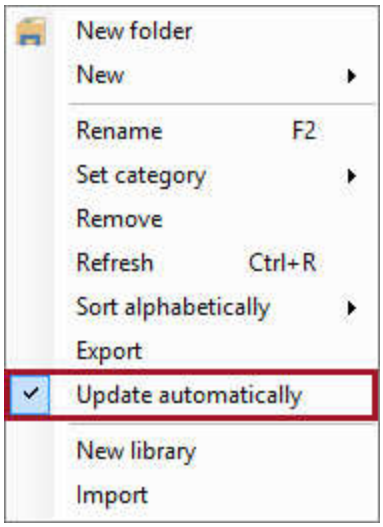
For each individual library, you can configure whether it should be updated automatically or not. This can be used to “freeze” the current version of a library.

This can be a useful option when a library is created for a team and will not be subject to any more changes, in which case you would disable automatic updates for the library.

Important: The way this function works will also depend on the synchronization settings configured under “Settings.”

- To disable automatic updates, **right-click** on the library and then click on **Update automatically**.

  The checkmark will be removed and the function will be disabled:




### Manual updates

To show a hidden register again, you can click on **Refresh**.

- **Right-click** on the library and then click on **Refresh**.

## 12.12 Using a library in a team

### 12.12.1 Sharing a library

**Please note:**

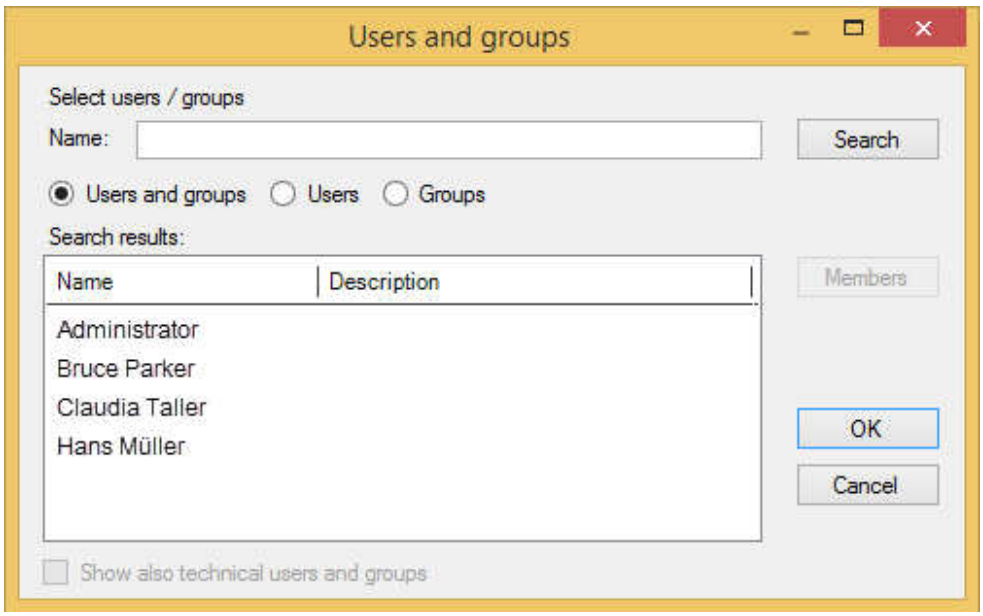
You will need specific permissions in order to be able to use this function. If you have any questions, please ask your administrator.

You can make your library and its contents available to other co-workers or to a group of people. The library will be shown in the corresponding users' folder view and they will be able to use it, but not modify it or remove it from the view. In other words, other users will not be able to add or remove files or registers or create new folders. These actions will be reserved for the library's owner only.

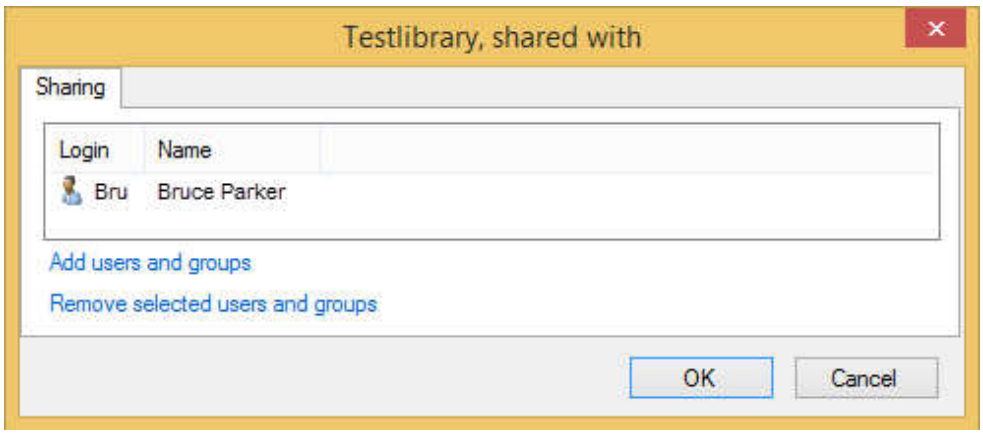
The tool tip for the library will show users who is sharing the library with them.

1. **Right-click** on the library.

   Important: Default libraries ("My Library," for example) cannot be shared.
2. Click on **Share**.
3. Click on **Add users and groups**.
4. Search for the user or group you want.
5. Select the user or group (hold down the **CTRL** key to select more than one) and click on **OK**.




The selected users / groups will be added and shown.




Important: To stop sharing a library, click on **Remove selected users and groups**.

6. Click on **OK**.

   The selected users/groups will be able to see the library in their folder view as soon as they restart doculife Desktop or refresh the view.

### 12.12.2 Exporting/importing a library

**Please note:**

Whether or not the **Export/Import** functions will be available will depend on the configuration for the tenant. If you have any questions, please ask your administrator.

**Exporting**

You can export your library's structure to a computer file so that it can be imported and used by your co-workers or by you on a different computer.

1. **Right-click** on the library and then click on **Export**.
2. Select a storage location, change the filename if you want, and click on **Save**.

**Import**

You can use the import function to import a co-worker's library or a library from a different computer. In contrast to the "Share" function, the imported library will belong exclusively to you and you will be able to customize and modify it as you wish.

1. **Right-click** on an empty area inside the folder view and then click on **Import**.
2. Select the export file (*.npx file) and click on **Open**.

# 13 Using the Office add-in

## 13.1 Opening a document from the DMS

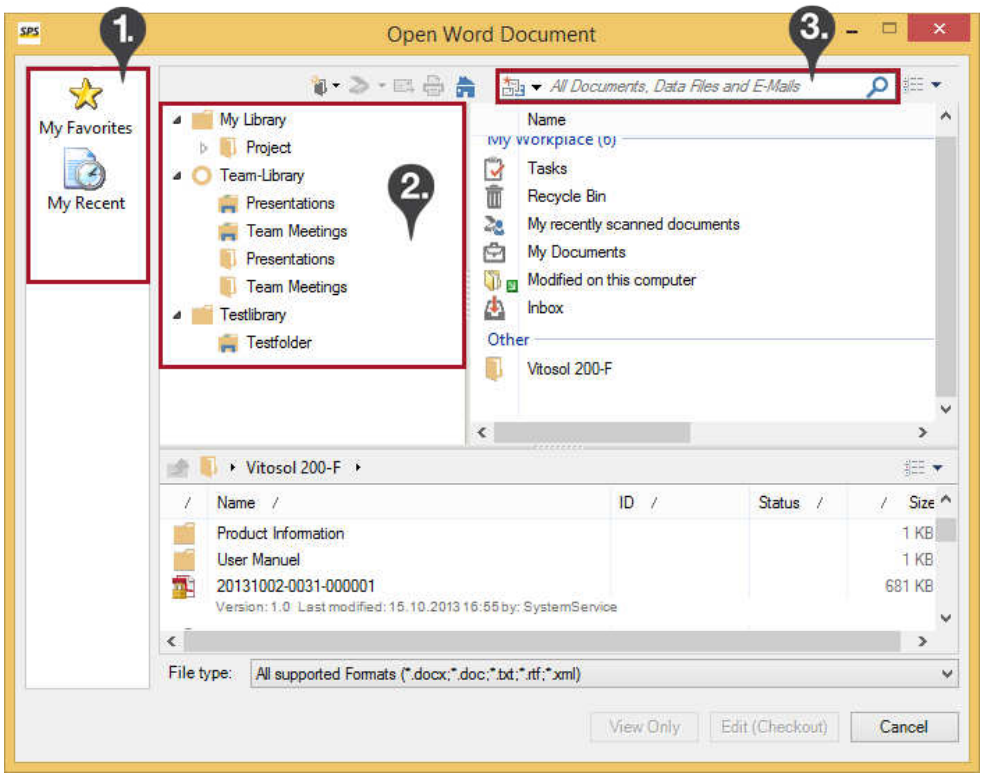
The function below can be used to open a document from the DMS in a Microsoft Office application.

1. In the **doculifeDesktop** ribbon, click on the **Open** icon.

The **Open** dialog box will appear.

The storage location currently selected in doculife Desktop will be opened.

2. Just like with the Outlook add-in, there are several ways to quickly view the document you want:
   - **(1) My Favourites and My Recent:** Select the document from your favourites or from your My Recent list.
   - **(2) My Library:** Use the library to select the document.
   - **(3)Toolbar:** Search for the document.




3. Click on the document you want and select:
   - **View Only** if you only want to read the document.
   - **Checkout and Edit** if you want to edit the document.

**Shortcut:**

If you open the document by **double-clicking** on it, it will automatically be checked out and you will be able to edit it.

## 13.2 Checking in a document

When you use the function below with a checked-out document, the document will be checked in as a new version and closed afterwards.

1. In the **doculife Desktop** ribbon, click on the **Check In** icon.

   The dialog box for entering a version comment will appear.
2. Enter a version comment or leave it blank.
3. Click on **OK**.

## 13.3 Checking out a document

If you need to, you can check out a document that you opened previously for viewing.

Important: Any changes that have been made to the document will be lost.

- In the **doculife Desktop** ribbon, click on the **Check Out** icon.

  Click on **Yes** in the prompt that appears warning that the changes to the document will be lost.

## 13.4 Cancelling a checkout

If you need to, you can cancel a checkout and close the corresponding document. When you do this, you will lose all the changes you have made.

- In the **doculife Desktop** ribbon, click on the **Cancel Checkout** icon.

  Confirm the prompt that appears to warn you that the checkout will be cancelled and that all changes will be lost. The document will be closed.

## 13.5 Adding a document to the DMS

You can add a new Microsoft Office document to the DMS or save an existing document in the DMS as a new document (much like how the “Save as...” option works in Word).

1. In the **doculife Desktop** ribbon, click on the **Add** icon.

   If the document already exists in the DMS, a prompt saying “**Document is already stored on server. Would you like to add it as new document?**” will appear. Click on **Yes**.

   The **Save** dialog box will appear.
2. Select the storage location for the document and confirm by clicking on **Save**.
3. Enter the properties for the document and click on**OK**.

   A prompt saying “**Document ... has been stored as version 1.0. Would you like to check the document out for further work?**” will appear.
4. Select:
   - **Yes** if you want to keep the document checked out.
   - **No** if you want to check in the document and close it.

## 13.6 Publishing a document as a PDF

You can publish (save) a copy of a document directly as a PDF in the DMS.

1. In the **doculife Desktop** ribbon, click on the **Publish as PDF** icon.

   The **Publish** dialog box will appear.
2. Select the storage location for the document and confirm by clicking on **Save**.
3. Enter the properties for the PDF and click on **OK**.

## 13.7 Refreshing the connection status

The program will automatically check and refresh the connection status at specific time intervals. If you need to, however, you can also check and refresh it manually.

- Click on the **Status** icon once. The status will be refreshed.

Any one of the following statuses may be shown:

| Status | Meaning |
|---|---|
| Signed in | You are logged in |
| Offline | You have not yet logged in or the status has not been refreshed yet |
| Locked | The account is locked<br>On SECPlus/SECmezzanine only |

## 13.8 Viewing vendor information

You can view the vendor's address and the add-in's version number as follows:

- In the **doculife Desktop** ribbon, click on the **About** icon.

## 13.9 Opening the online help function

If you have any questions regarding doculife Desktop, you can check the online help pages.

- In the **doculife Desktop** ribbon, click on the **Help** icon.

# 14 Searches: reliably finding documents and files

## 14.1 Introduction

One of the advantages of using a DMS is that all documents and files can be easily and quickly found in a matter of seconds by running a search. And in order to make these searches as effective and convenient as possible, the solution comes with a series of available default searches that are based on proven search criteria.

For example, there may be “preset” searches that can be run immediately without requiring you to enter any search terms (e.g., searches for a very specific type of file). Moreover, you will still be able to search for documents and files “conventionally,” i.e., by using the specific search terms you want. The way this is done will depend on the type of search being used, as some will require you to enter your search terms into the search bar and others into a search template.

Moreover, you will be able to create and save your own custom searches.

The following are the main types of searches available:

- **Full text search** : Used to search through a document’s contents (full-text) and important properties
- **docusearch**: Used to search through a document’s contents, complemented by filter options
- **Index-based search**: Used to search through properties
- **Mixed search**: Used to search through full text and properties

Searches can be run from the **toolbar**.

## 14.2 Using the toolbar for searches

Select the search in the search field choice list, enter a search term, and click on the **Search** icon or press the **ENTER** key.

*Figure: Full text search using the toolbar*

**Please note:**

The type and scope of searches that will be available will depend on the solution being used. The searches shown in this section are based on the program’s default configuration and may not be an exact match for your actual setup.

**Icons for searches:**

In order to make sure that you can identify the searches quickly, each one of them features its own unique icon:

- Icon for searches for files and workmaps
- Icon for searches for documents, data files, and e-mails
- Icon for searches for e-mails
- Icon for searches for documents or files with reminders

- Icon for searches for archived documents and files
- Icon for personal search templates

**Please note:**

Additional icons may be available depending on the specific solution being used.

## 14.3 Full text search

The main purpose of full-text searches is to make it possible to find a document based on a specific word found in the document's full text. doculife also searches through the following document properties when a search of this type is run: document title, keywords, value, and reference ID.

If a document is stored in the DMS, its full text and the aforementioned properties will be indexed. However, any stop words found will be left out from the index ("stop words" are words with no significant importance in terms of a document's contents (e.g., articles such as "a," "an," "the"), which is why they are not taken into account when performing a search). The reason why stop words are left out from the index and not taken into account when performing a search is that too many documents would be returned as hits otherwise ("please refer to the "Additional information," "List of stop words," and "Full-text indexing document formats" sections).

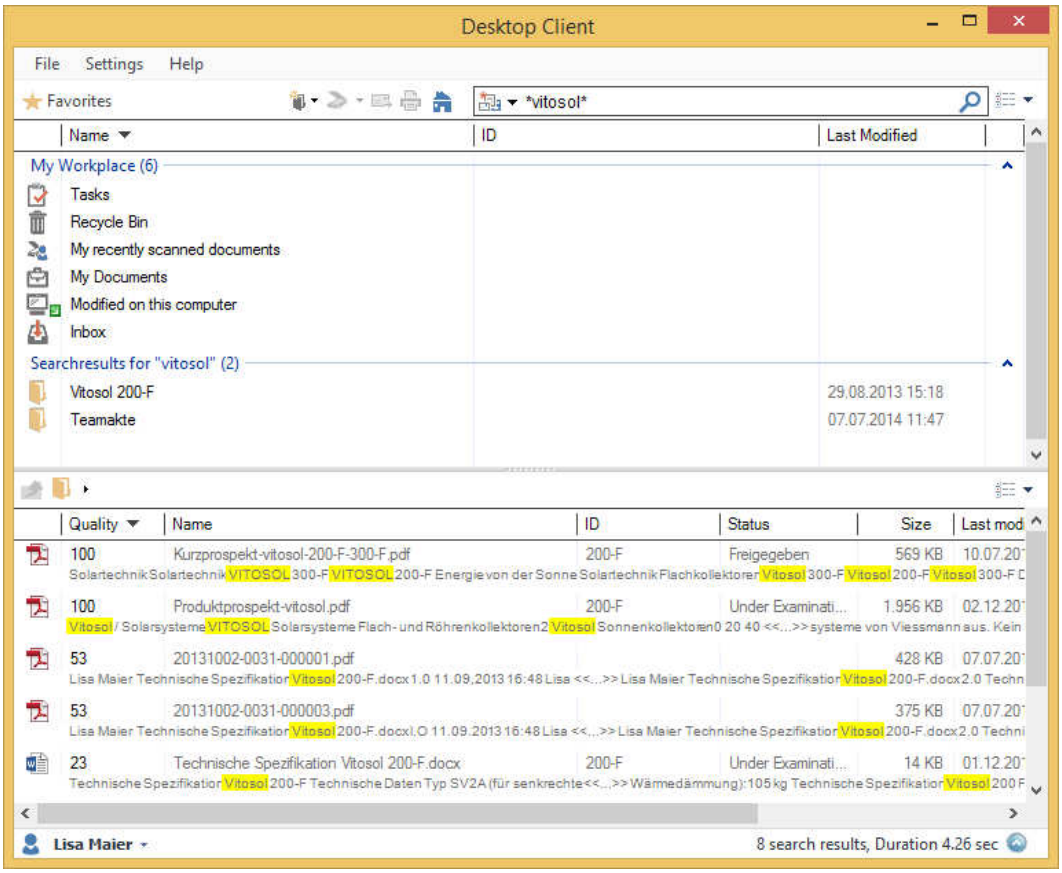
The search results for a full-text search will provide a relevance rating for each document found, as well as brief look at its contents based on how the corresponding settings are configured.

Generally speaking, wildcards can be used when running a search. Whether or not wildcards can actually be used will depend on the configuration for your tenant and on your personal search settings. By default, only wildcards within a word (i.e., not at the beginning or end of the word) are allowed when running a full-text search.

**Please note:**

Please refer to the "Searching tips & tricks; Searching with wildcards" section for instructions on how to use wildcards in your searches.

*Example: Searching for project instructions with a full-text search*




## 14.4 docusearch

**Please note:**

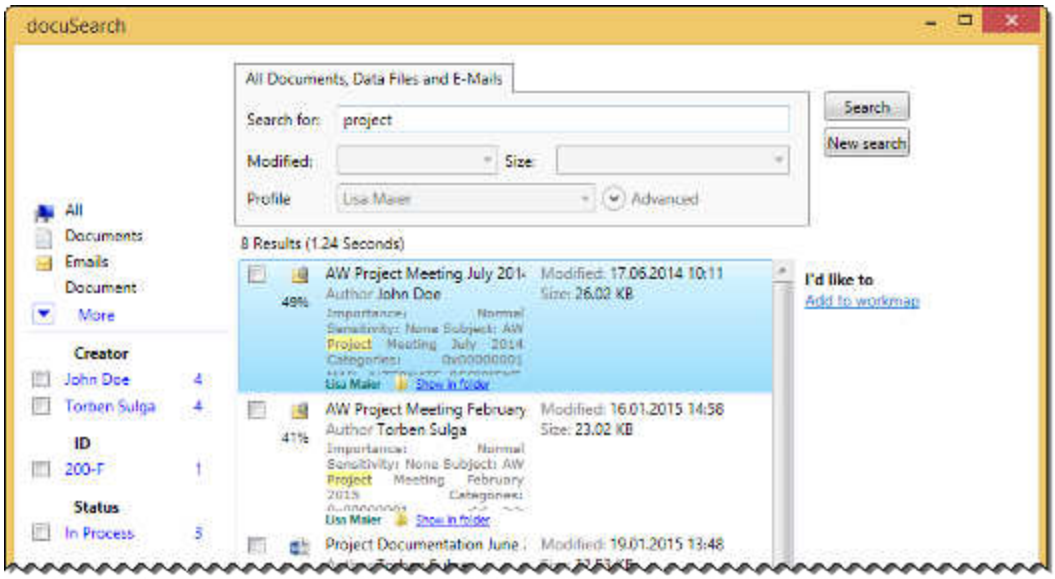
The way in which **docusearch** works will depend on the solution being used.

**docusearch** is an advanced full-text search that in addition groups search results based on their property values (document type, author, etc.). Moreover, it allows for search results to be limited to specific item types (files, documents, and/or e-mails).

To run a **docusearch**, start by selecting the full-text search you want in the toolbar and then click on the icon at the beginning of the toolbar.

*Figure: Running a docusearch*

*Figure: Searching for project instructions with a docusearch*




## 14.5 Index-based search

When using an index-based search, search terms are searched for only in the properties of the items stored (files, registers, documents). Depending on how the corresponding settings are configured, one or more property fields will be searched through and you will be able to run the search either from the toolbar or by using a search template.

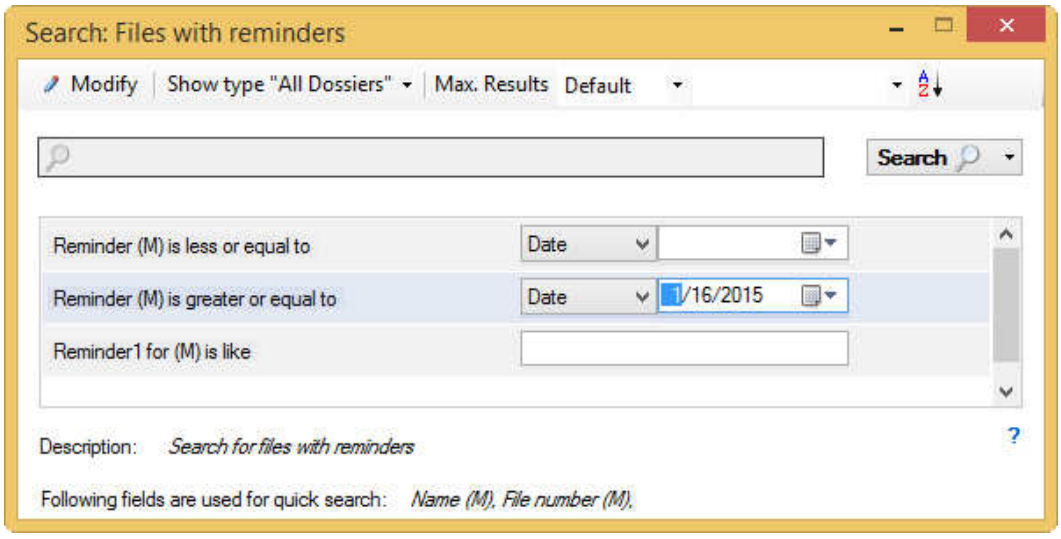
In addition, index-based searches can be pre-populated with search terms.

Generally speaking, wildcards can be used when running a search. Whether or not wildcards can actually be used will depend on the configuration for your tenant and on your personal search settings. By default, the * wildcard will be generally allowed.

**Please note:**

Please refer to the “Searching tips & tricks; Searching with wildcards” section for instructions on how to use wildcards in your searches.

*Example: Using a search template to search for files with reminders*



## 14.6 Mixed search

**Please note:**

Whether or not mixed searches will be available will depend on the solution being used.

This search is a combination between full-text and index-based searches for documents, data files, e-mails, files, and workmaps.

Search terms will be searched for both in the contents and properties of documents and in the properties of files and workmaps.

The search results may include both documents and files and workmaps.

## 14.7 Searching tips & tricks

### 14.7.1 General information

#### 14.7.1.1 Autocomplete

All the search terms that you enter into the search box will be saved and will be suggested automatically the next time you are entering information into the box (autocomplete). This means that frequently used search terms only need to be entered once and can be simply autocompleted afterwards.

If necessary, you can clear this list in the settings.

*Figure: Autocomplete reducing the amount of typing required*

#### 14.7.1.2 Case sensitivity, umlauts

Searches are not case-sensitive and do not distinguish between writing with umlauts (ö, ü, ä) or their alternative counterparts (oe, ue, ae).

**Example:**

Searching for **documentation** will find **DOCUMENTATION** and **Documentation**.
Searching for the German word **"Wandgeraet"** will find **Wandgerät** and **Wandgerät**

#### 14.7.1.3 Searching with wildcards

**General information**

To make searches easier, you can enter "incomplete" search terms that will be completed automatically during the search.

Simply use the * (asterisk) wildcard at the point where you want the function to complete the term automatically. (The asterisk wildcard can take the place of any number of characters in a search term.)

**Example:**


The search term shown above will find any documents containing words or properties starting with “project”. Examples of the terms that may be found include: ProjectInstructions, ProjectSchedule, ProjectBudget, etc.

**Do not use wildcards at the beginning of a word:**

The earlier the wildcard comes in the search term, the longer a search with wildcards will take. Above all, using the *wildcard at the beginning of a search term (for example: *manual) should only be done in a targeted manner and in exceptional cases, as it will require the program to search through extremely large volumes of data – especially when using a full-text search (i.e., all the words in every document). In fact, running a search like this will be both time-consuming and ineffective, as it will return too many hits.

**Placeholders for full-text searches**

Whether or not wildcards can be used in a full-text search will generally depend on whether your tenant’s configuration allows it and on your personal search settings.

By default, using wildcards at the beginning and end of search terms in full-text searches is not allowed. In other words, only wildcards within a word are allowed by default.

## 14.7.2 Full text search

### 14.7.2.1 Word length and characters allowed

Words can be as long as necessary, but must have a **minimum of two characters**.

All letters, numbers, and special characters are allowed.

### 14.7.2.2 Searching for multiple words

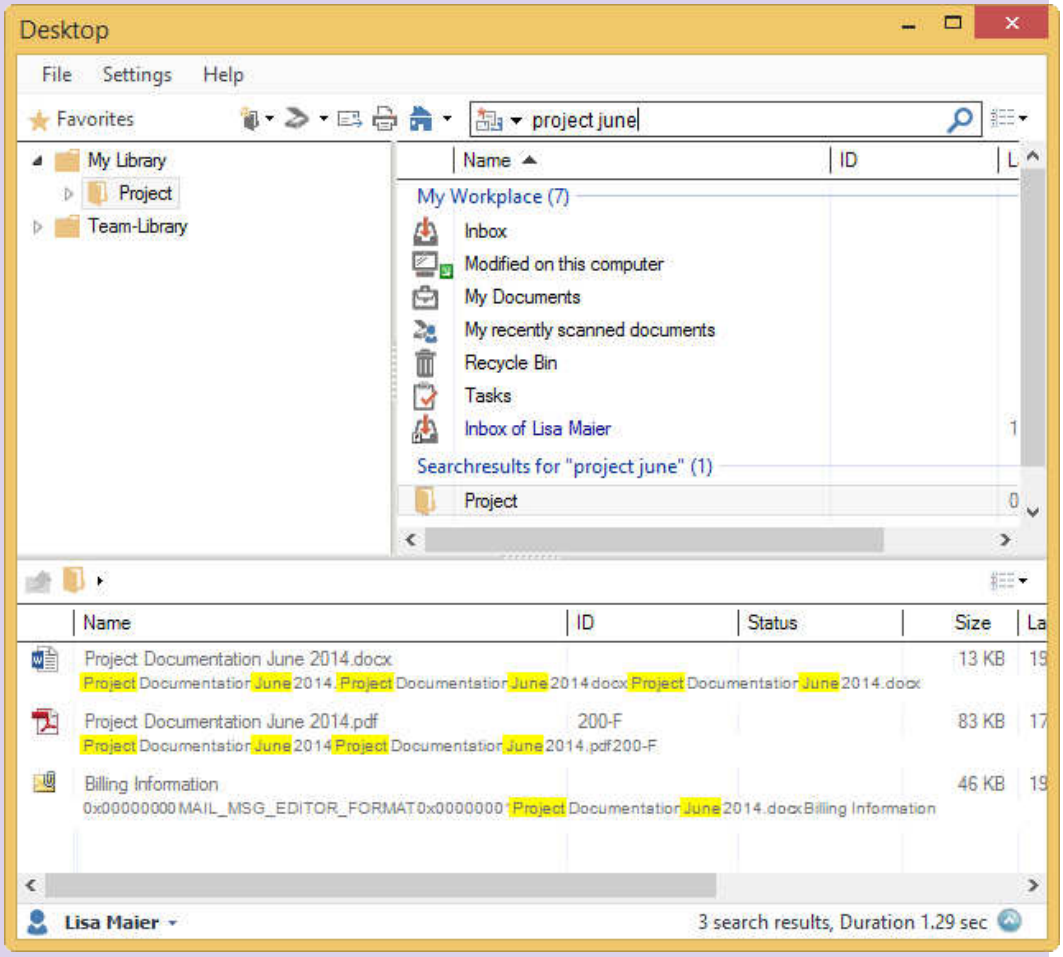
You can search for multiple words when running a full-text search. Enter the words into the search bar, separating them with a space. The order in which you enter the words will not affect the results. The space between the words will be interpreted as a logical AND by default.

**Please note:**

Other logical operators may be implemented depending on the specific solution being used.

**Example:**

Searching for **instructions wall** will return all documents containing the words “instructions” and “wall.” The order in which you enter the words will not affect the results.

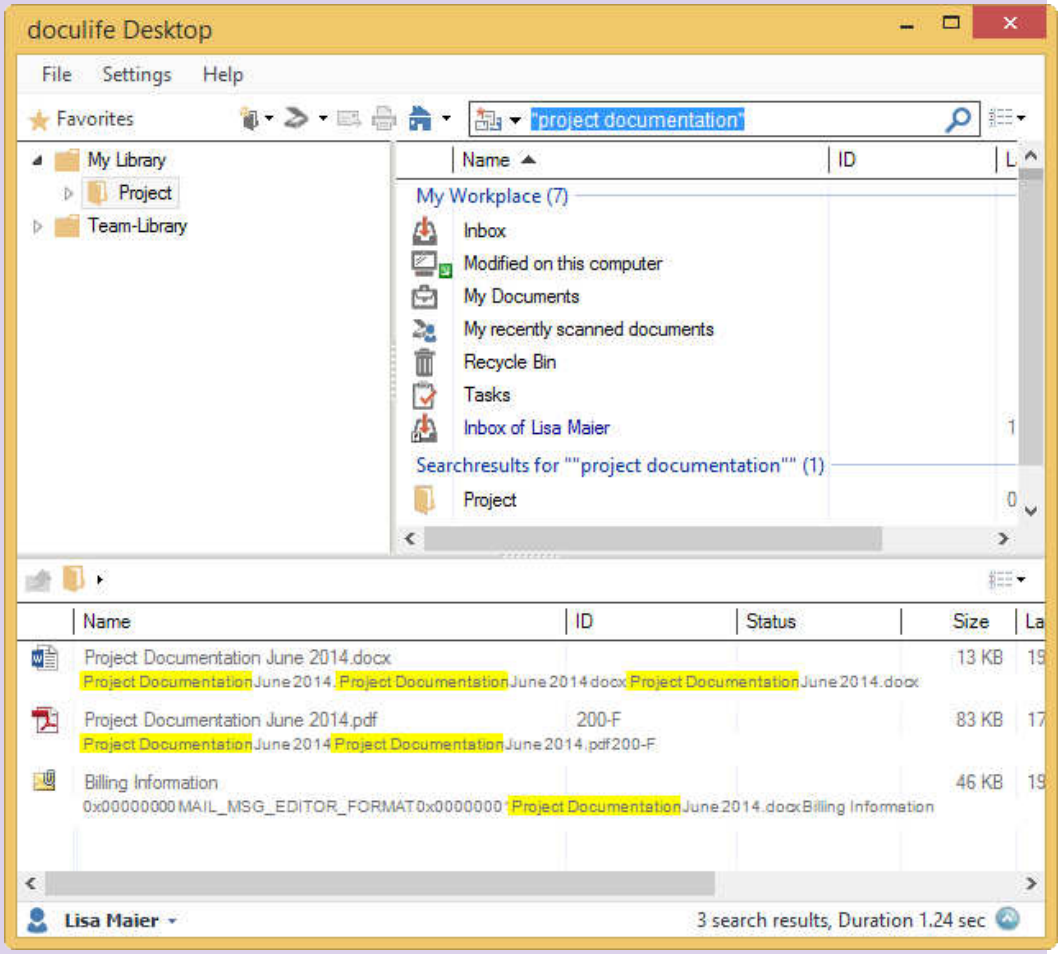



### Searching for words in an exact order (text phrases)

If you want to search for exact text phrases, place quotation marks (**"**) around the phrases.

**Example:**

Searching for **“fasten the mounting plate"** will return all documents in which these four words appear in exactly this order and combination.




### 14.7.2.3 Stop words

Stop words are words that are ignored in full text searches because they appear very frequently and are not important in terms of document content. Searching for a stop word will not return any hits. Please refer to the “Additional information; List of stop words” section for a list of the default stop words.

**Examples of stop words:**

Definite articles: the
Indefinite articles: a, an
Conjunctions: and, or

### 14.7.2.4 Cancelling a search

**Please note:**

Whether or not this function is available will depend on the ways the settings for your solution are configured.

A search that is not “precise” enough will be ineffective, as too many search results will be found and the search will accordingly take a very long time. This applies especially to full-text and mixed searches in which the full text of documents is searched through.

In this type of case, you can cancel the search by clicking on the magnifying glass icon in the search bar. As long as the search is running, there will be a red X on the bottom right of the icon, indicating that you can cancel the search.

After cancelling a search, make sure to run the next one using “more appropriate” search criteria.

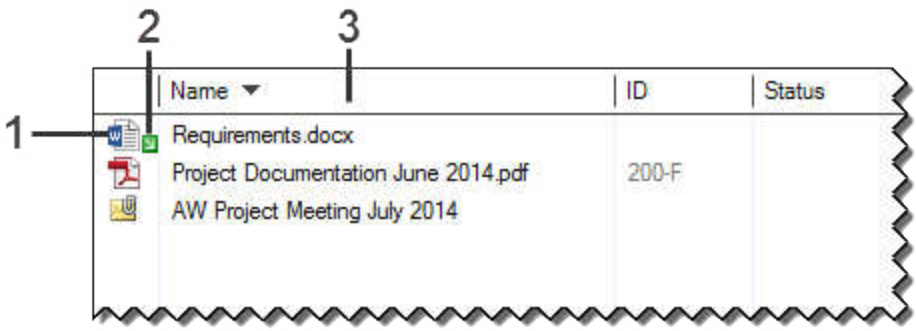
## 14.8 Search results

### 14.8.1 Overview

Search results show the files and/or the documents, computer files, and e-mails that have been found.

The following figure uses search results in the document pane in order to illustrate the various relevant elements:

*Figure: Search result elements*




| | |
|---|---|
| (1) | Item icon (document format, e-mail, or register) |
| (2) | Additional information on the item, e.g., icon for checked-out |
| (3) | The item’s properties, e.g., name and date modified. You can configure which columns should be shown, as well as the order in which they will be shown (please refer to the “Showing additional columns” section). |

If you run a full text search, the search results will also show (in the text summaries) the places where the search term was found and highlight them in yellow (1). Important: The yellow highlighting may be disabled depending on how the solution being used is configured.

In addition, the relative hit quality of each document will be shown (2). This hit quality provides an indication of the exactitude of the search result / of how closely the search result matches the search query.

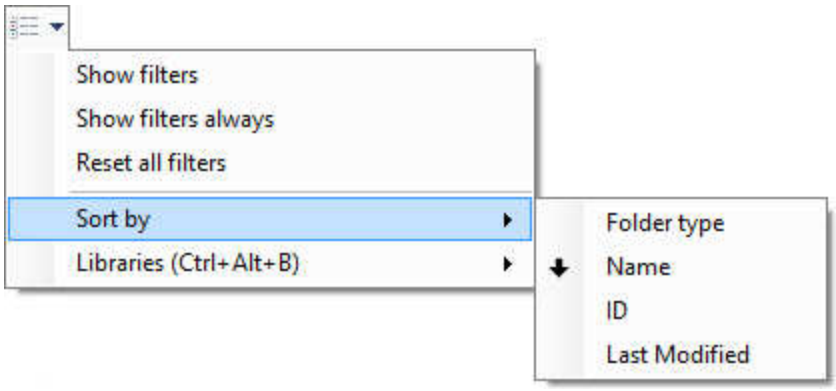
*Figure: Search results for full text search, with highlighted terms*

## 14.8.2 Sorting search results

You can sort search results in ascending or descending order.

- You can use one of the following methods:
  - Click on the **column header** for the column that you want to use as a basis for sorting.

    The arrow icon next to the column header will show whether entries are being sorted in ascending or descending order.
  - Click on the **Customize document view, Sort by** icon option and then select the type of sorting you want.



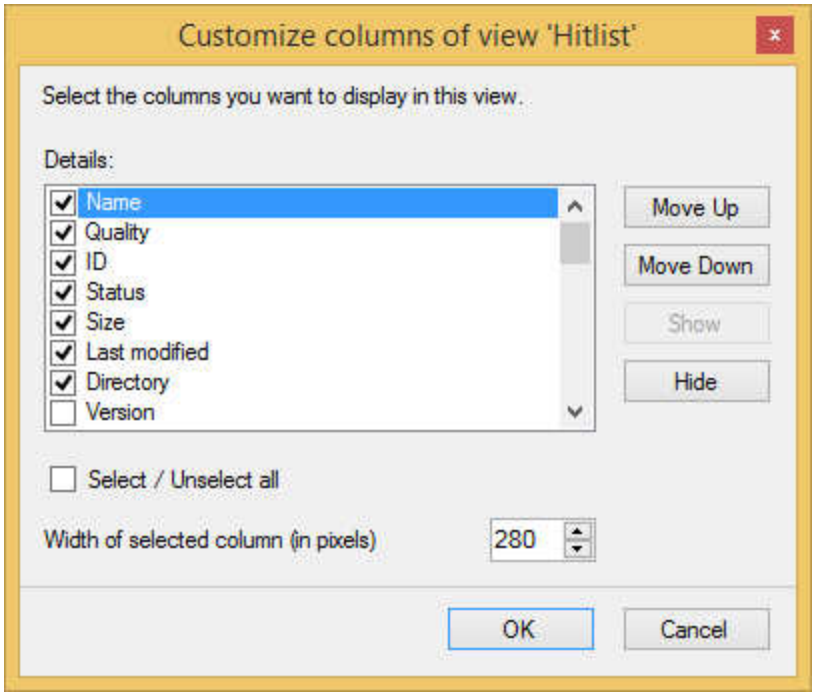

**Please note:**

The columns' sorting will be saved and automatically used the next time you start doculife Desktop.

## 14.8.3 Showing additional columns

You can define which columns (properties) will be shown in the search results, as well as the order in which they will appear.

1. **Right-click** on a column in the search results.
2. Click on **View, Customize...**
3. Enable/disable the columns you want and, if necessary, change their order by using the **Move Up / Move Down buttons.**




### 14.8.4 Exporting search results

You can export and save search results in a variety of formats in order to analyze them with Excel, for example. All visible properties (columns) will be exported.

*Figure: Search results in Excel format*

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | File Title | Name | Quality | ID | Size | Status | Last modifi |
| 2 | Project | Project Documentation June 2014.pdf | 16 | 200-F | 83 KB | | 17.06.20 |
| 3 | Inbox | Project Kick Off Planning | 8 | 200-S | 13 KB | Under Examination | 17.06.20 |
| 4 | Project | Requirements.docx | 8 | | 13 KB | | 17.06.20 |
| 5 | | | | | | | |

1. **Right-click** on a line in the search results.
2. Then click on **Send to, Send Hitlist to...**
3. Select:
   - **CSV**: To save the search results as a CSV file
   - **HTML**: To save the search results as an HTML file
   - **Excel**: To save the search results as an XLS file
   - **List Printer**: To print out the search results

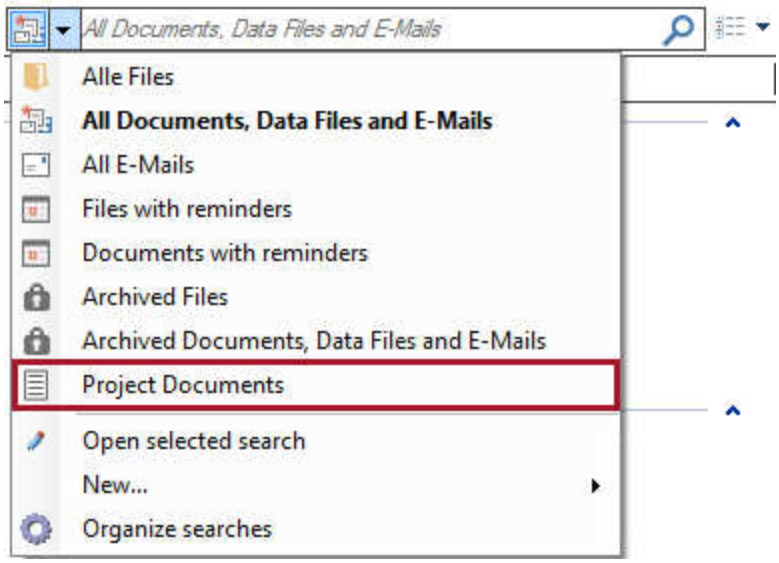
# 15 Optimizing searches

## 15.1 Working with personal search templates

### 15.1.1 What is a personal search template?

Is there a search query that you use particularly often? If so, you can easily create a new personal search template with your own custom search criteria and add it to the search choice list.

*Figure: Personal search template in choice list*




### 15.1.2 Creating personal search templates

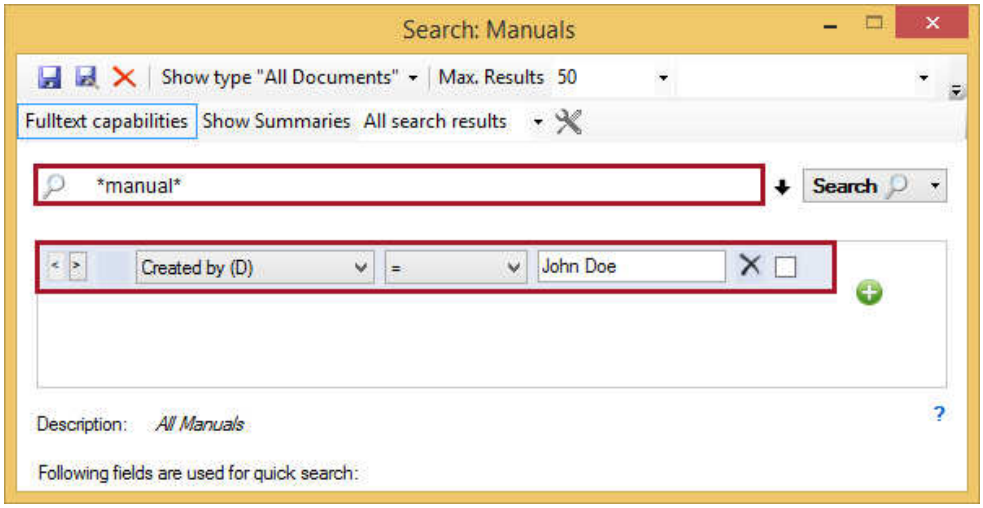
If you want, you can create a personal search template with custom search criteria and add it to the searches available for selection.

1. Open the search choice list in the search box and select the **New...** command.
2. Select the search that you will use as a basis (All Documents, Data Files and E-Mails, for example).

   The search template will appear.
3. Click on the **New line** icon to add a new search line.
4. Select a search criterion from the choice list.

   Document properties will be identified with “D”; file properties with “M.”

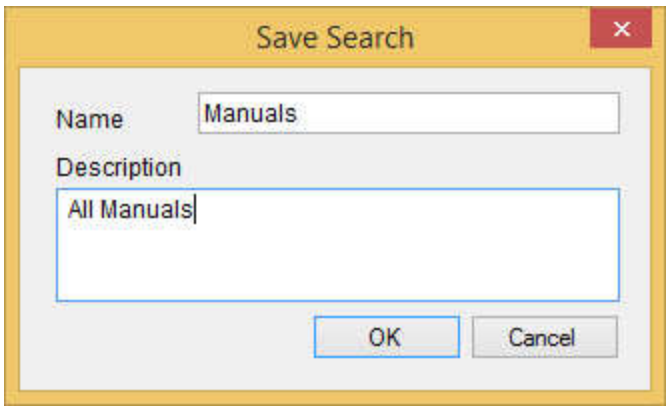
   **Example:** To search for all the manuals created by John Doe, you will need to use the “Created by (D)” search option and *manual* as a search criterion.




5. Click on **Search** to test the search.

   The search will be run and the dialog box will remain open. If necessary, you can fine-tune your search as required.

6. Click on the **Save as...** icon if you want to save the search.
7. Enter a **name** and, if you want, a **description**. If you move your cursor over the search later on, the program will show the description as a tool tip in the selection window.




8. Click on **OK**.

   You have now saved your new search template.

9. Close the dialog box with the **Close icon**.

   The new search template will be added to the search choice list. To change the order, go to **Settings, Searches, Manage search masks**.

### 15.1.3 Editing personal search templates

Say you have created a personal search template and want to modify it.

1. Open the search choice list in the search box and **right-click** on the search template you want to modify.

   If you ran the corresponding search previously, you can instead use the **Open selected**

**search** command.

The search template will appear.

2. Click on the Modify **Modify** icon.
3. Make the changes you want.
4. Click on the **Save changes** icon to overwrite the existing search or click on the **Save as...** icon to create a new search template.

### 15.1.4 Deleting personal search templates

Say you have created a personal search template and want to delete it.

1. Open the search choice list in the search box and **right-click** on the search template you want to modify.

   If you ran the corresponding search previously, you can instead use the **Open selected search** command.

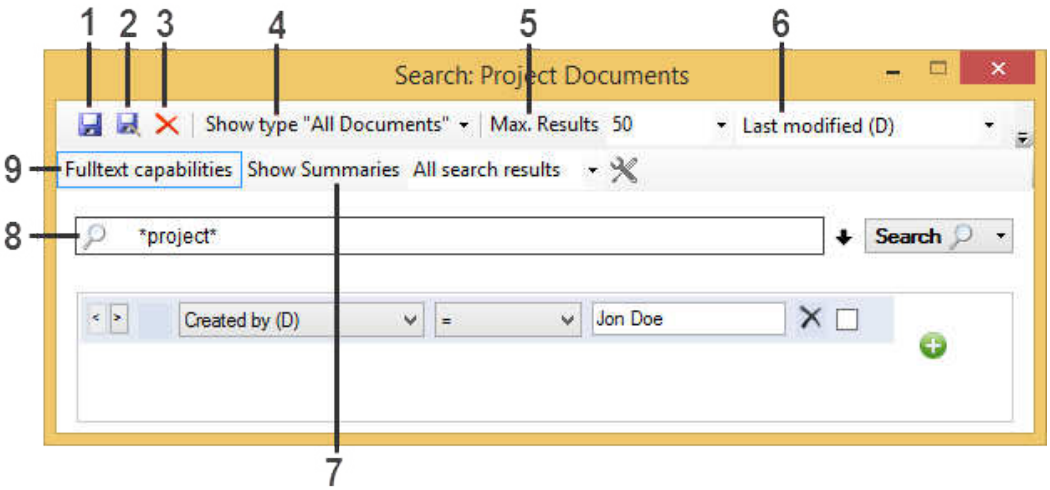
   The search template will appear.

2. Click on **Modify** and then on the **Deletes current search mask** icon. Then confirm that you want to delete the search template.

   Important: Preconfigured searches cannot be deleted.

### 15.1.5 Search template options

This section will use a personal search template in “modify mode” in order to describe the various search template options.




| | |
|---|---|
| **(1)** | Save |
| **(2)** | Save as... |
| **(3)** | Delete search template |
| **(4)** | Search for: Used to select a search as a basis |

| | |
|---|---|
| **(5)** | Max. Results: Used to limit the number of search results. The default value is 50. Selecting “Presetting” will apply the value from the settings (please refer to the “Limiting the number of search results” section). |
| **(6)** | Used to select the sorting criterion and order (ascending or descending) for the search results |
| **(7)** | Show Summaries (for full text searches): Used to specify the number of search results for which a summary will be shown. |
| **(8)** | For full text searches: Search term.<br>Clicking on the ▼ arrow icon at the end of the line will show the “Intelligent search field extensions” field, which can be used to define a native Oracle search. |
| **(9)** | Fulltext capabilities: Used to enable / disable full-text searching |

### 15.1.6 Using multiple search criteria

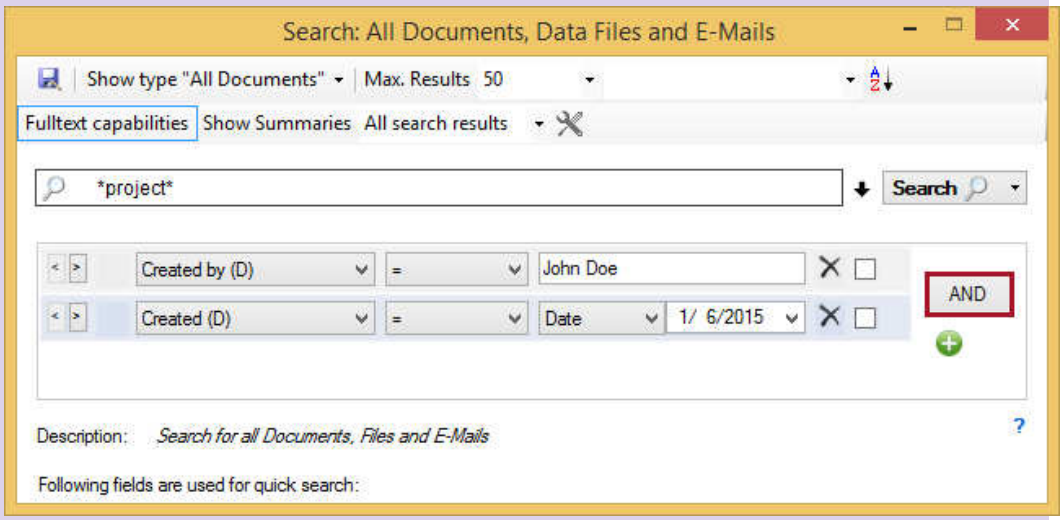
You can combine multiple search criteria and connect them with a logical OR or AND.

To create a new search line, click on the **Plus symbol** icon. The search lines will be automatically connected with a logical AND. You can click on the operator to switch between AND and OR.

**Logical AND example:**

Say you want to search for all documents that have “Vitoclima” in their name and that have content that John Doe has created since October 1st, 2013.

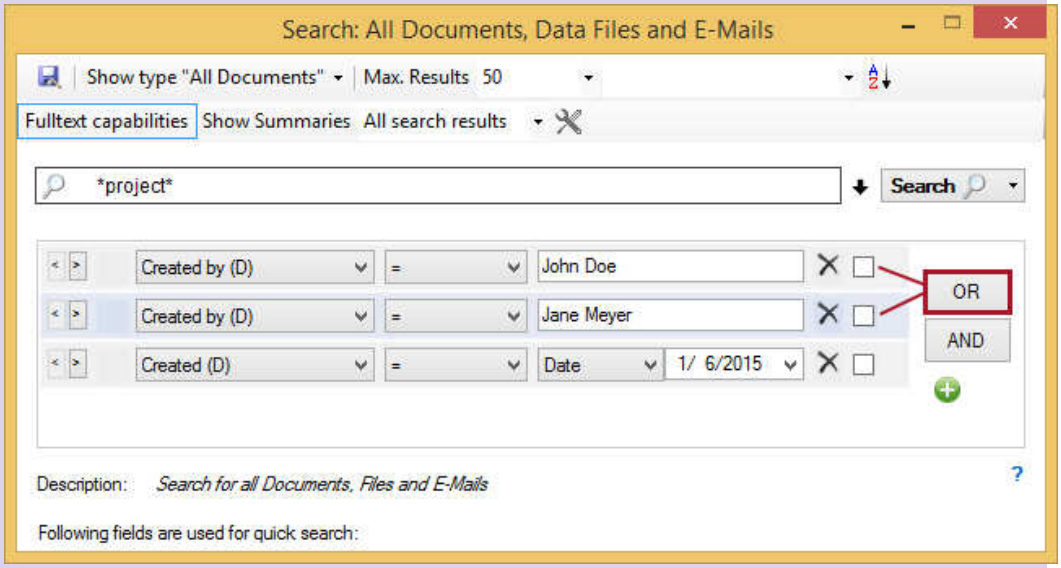
You would use the configuration below and connect all search criteria with a logical AND.



**Logical OR example:**

Say you want to search for all documents that have “Vitoclima” in their name and that have content that John Doe or Jane Meyer has created since October 1st, 2013.

You would use the configuration below and connect the first two search criteria with a logical OR.



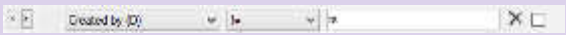

## 15.1.7 Sharing personal search templates

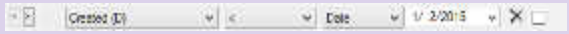
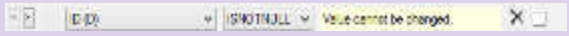
If you want to, you can export one of your custom searches to the Windows filesystem and provide it to another user so they can import it.

For more information, please refer to the “Customizing settings, Searches, Manage search masks” section.

## 15.1.8 Relational operators - examples

The following relational operators are available for creating search queries:

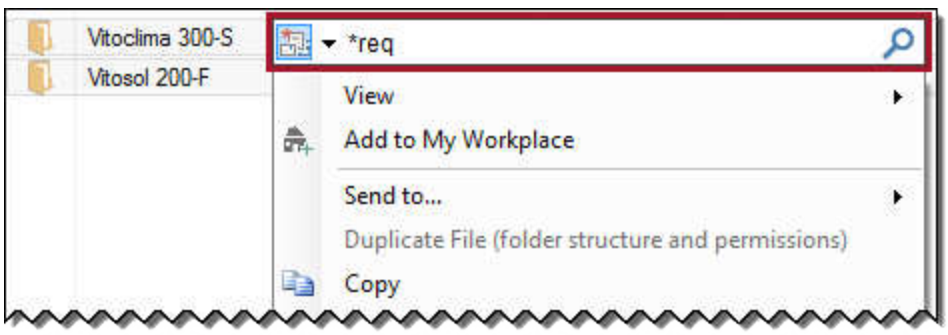
| Operator | Description | Example |
|---|---|---|
| = | “Field” is equal to “Value” | To search for documents that John Doe has created: |
| **LIKE** | “Field” contains “Value” | To search for documents with a title containing “vitoclima”: |
| **NOT LIKE** | “Field” does not contain “Value” | To search for documents with a title not containing “vitoclima”: |
| **!=** | “Field” is not equal to “Value” | To search for documents that John Doe did not create:  |

| Operator | Description | Example |
|---|---|---|
| **>** | “Field" is greater than "Value" | To search for documents created after March 1st, 2012: |
| **<** | “Field" is less than "Value" | To search for documents modified before April 1st, 2012:  |
| **>=** | “Field” is greater than or equal to “Value” | To search for documents modified on or after March 1st, 2012: |
| **<=** | “Field” is less than or equal to “Value” | To search for documents modified before or on April 1st, 2012: |
| **ISNULL** | There is no “Value” for “Field” | To search for documents for which the “Reference id” property field is blank. |
| **ISNOTNULL** | There is a “Value” for “Field” | To search for documents for which the “Reference id” property field is not blank.  |

## 15.2 Searching in selected files

You can limit your search to selected files or folders under “My Workplace.”

1. Select the files you want to search (to select multiple files, hold down the **CTRL** key)
2. **Right-click**.
3. Enter the search term into the context menu’s search box and confirm by pressing **ENTER**.




## 15.3 Search options

You can configure the **settings** to customize the search according to your specific needs. The following settings are important in particular:

- Wildcards for searches: Please refer to the “Customizing settings, Searches, Wildcards” section
- Limiting the number of search results: Please refer to the “Customizing settings, Common, Default search” section
- Order of searches: Please refer to the “Customizing settings, Searches, Manage search masks” section

# 16 Working with filters

## 16.1 What is a filter?

Say you just ran a search and you got too may search results. You can use a filter to further limit the results you are getting Filtered search results only show the lines that meet the specified criteria, while the search results that you do not want to be shown will be hidden.

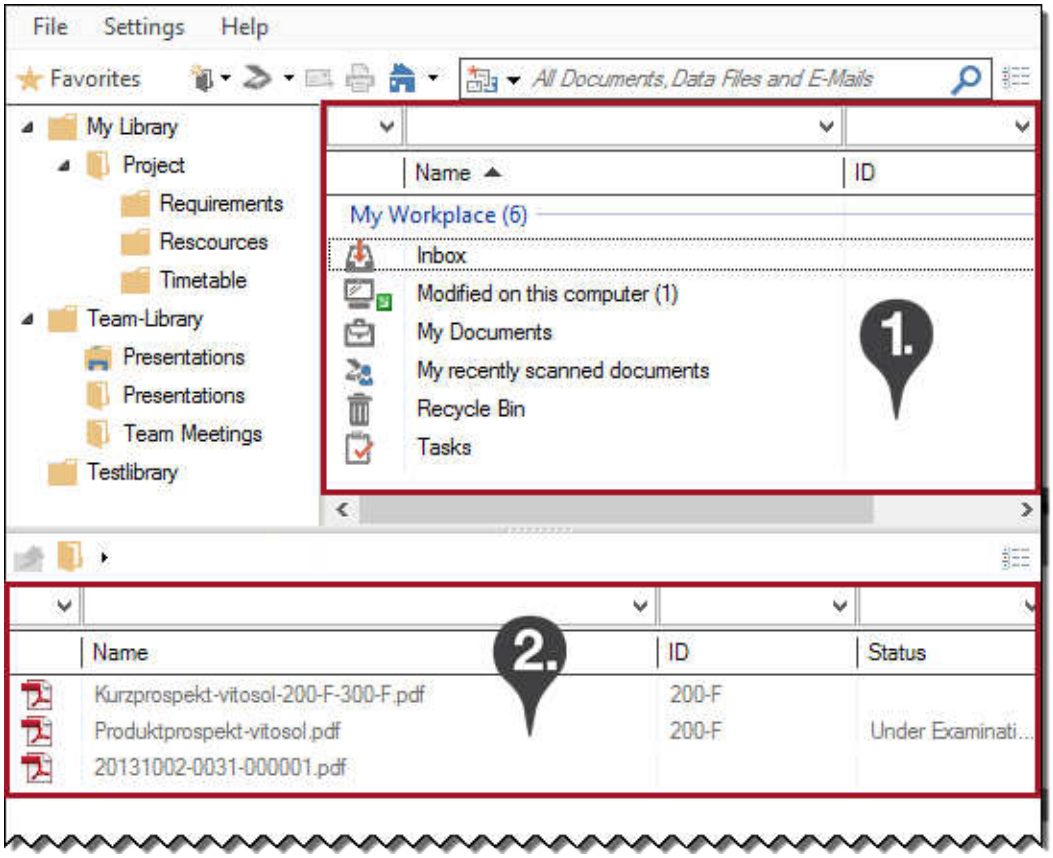
In addition to this, you can apply more than one filter to search results by using the various columns available. These filters are additive, meaning that each additional filter will apply to the results from the previous one and the subset of data being shown will be limited even further.

The example below shows the results of a document search being filtered by document type and name.

*Example: Filtering PDF files so that only those with "vitosol" in their name will be shown*

## 16.2 Viewing filters

You can use filters for your **workplace**, including the **file pane (1)** and the **document pane (2)** , independently of each other.




1. In the pane you want, click on the **Customize document view** icon.
2. Select **Show filters** or **Show filters always** if you want the filter to be shown always.

## 16.3 Applying filters

By using a filter, you can filter search results or items in your workplace based on specific criteria.

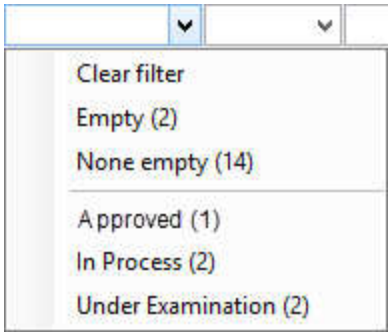
Make sure that the filter is visible.

1. Click on the ▼ arrow in the column header.
2. Do one of the following:

– Select a value from the list of index values in order to use it as a filter.

Important: Values will then be offered for filtering if the index values in the column are based on a choice list (e.g., “Status” index value)

*Example: Filtering documents by status so that only those with the “Approved” status will be shown*




– Enter the value you want to use for filtering and press the **ENTER** key.

Important: Wildcards (* or ?) are not permitted in the value. The * wildcard (for any number of characters) will be placed automatically at the beginning and end of the filter term before applying the filter.

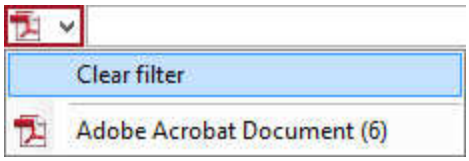
*Example: Filtering documents so that only those with “vitosol” in their name will be shown*

## 16.4 Resetting filters

You can clear the filters for a specific column or all the filters in a pane.

### Clearing a filter for a column

- Click on the arrow in the column header and then click on **Clear filter**.




### Clearing all the filters in a pane

- Click on the **Customize document view** icon and then click on **Reset all filters**.

# 17 Working with e-mails

## 17.1 General information

You can manage your e-mail correspondence together with the documents in the DMS by writing e-mails directly in the DMS and using Outlook to send them. This way, your e-mails will be stored securely together with all relevant documents.

e-mails will be automatically stored in the relevant file / register even if you forward them or reply to them from the DMS.

In addition, you can easily **drag and drop** the following e-mail elements from Microsoft Outlook onto the DMS:

- e-mails with and without attachments
- Encrypted and signed e-mails
- Read receipts
- Out of Office Assistant messages
- Meeting requests, accepts, declines, propose new times, etc.

When you store an e-mail, the subject will be used as a title. The sender and recipient will be copied to the properties as well (depending on the specific configuration being used). Entering additional properties for an e-mail is not required, but you can do so if you want.

e-mails with attachments can be stored as follows:

- The e-mail together with its attachments
- The e-mail and the attachments separately

One advantage of storing an e-mail and its attachments separately is that you will then be able to search for the attachment(s) itself in the DMS. In addition, this will allow you to store the attachment in a different file or register.

## 17.2 New e-mail

You can write and send a new e-mail directly in the DMS.

**Please note:**

If you are running doculife Desktop in its own separate window, make sure that Outlook is also running.

1. Open a file or register, **right-click** inside the document pane, and then click on **New, E-Mail**.

   The Microsoft Outlook message form will appear.
2. Write your e-mail and send it.

   Once the e-mail is sent, a copy will be stored in the file / register you selected.

   Depending on the settings configured, the sent e-mail may then be deleted from the Sent Items folder in Outlook.

## 17.3 Adding e-mails from Outlook

To import an e-mail from Outlook, simply **drag and drop** it. The program will also import all of the e-mail's attachments.

- Select the e-mail(s) in Microsoft Outlook and drag them, while holding down the **left mouse button**, to the document pane or to a file / register in the file pane or in the folder pane.

  Important: Importing e-mails from the Conversation View is not supported. To be able to import e-mails by dragging and dropping them, please change the view settings in Outlook.

## 17.4 Adding encrypted and signed e-mails

You can also store encrypted and signed e-mails in the DMS. Signed e-mails will be identified with the "red medal" icon, while encrypted e-mails will be identified with the "blue padlock" icon.

When adding these e-mails to the DMS, they can be stored either encrypted or decrypted. Please keep in mind that if you store encrypted e-mails in the DMS, only users who have the proper key will be able to read them. In contrast, anyone will be able to read decrypted e-mails (provided they have the necessary access permissions).

**Please note:**

If the system is unable to decrypt an e-mail (because the required key is missing or the key provided is incorrect, for example), it will only be possible to store the e-mail in encrypted format in the DMS.

- Select the e-mail(s) in Microsoft Outlook and drag them, while holding down the **left mouse button**, to the document pane or to a file / register in the file pane or in the folder pane.

  The following dialog box will appear:

How to store encrypted emails?
Encrypted emails detected.
Do you want to store the emails in decrypted format, if possible?
Decrypted
Encrypted

  There are two options available:

  - Click on **Decrypted** if you want the e-mail to first be decrypted and then stored. If you select this option, the signature will be removed from the e-mail as well.
  - Click on **Encrypted** if you want the e-mail to be stored in its encrypted format.

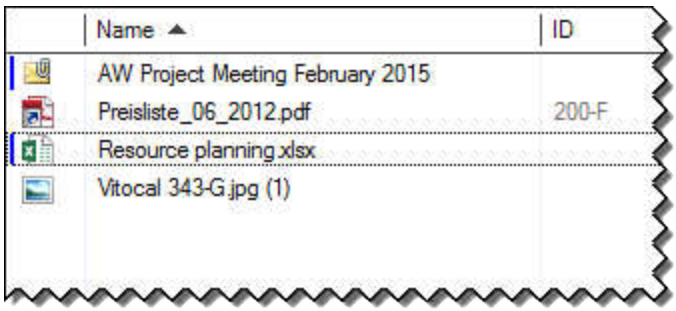
## 17.5 Storing an e-mail and its attachments separately

You can store e-mails and attachments separately. One advantage of doing this is that you will then be able to search for the attachments themselves in the DMS, as they will be maintained as “independent” documents there.

**Please note:**

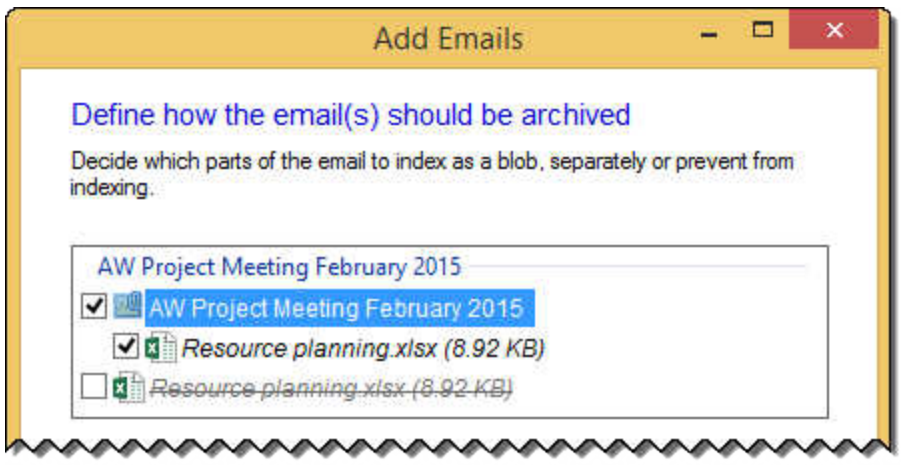
In the case of encrypted e-mails, you will only be able to do this if you clicked on the **Decrypt**button when transferring the e-mails from Outlook.

An e-mail and its attachments will be identified as a **group** by blue bars as soon as you click on an element in the group. The association between the e-mail and the attachments will be retained even if you store them in separate locations (please refer to the “Show related documents” section).

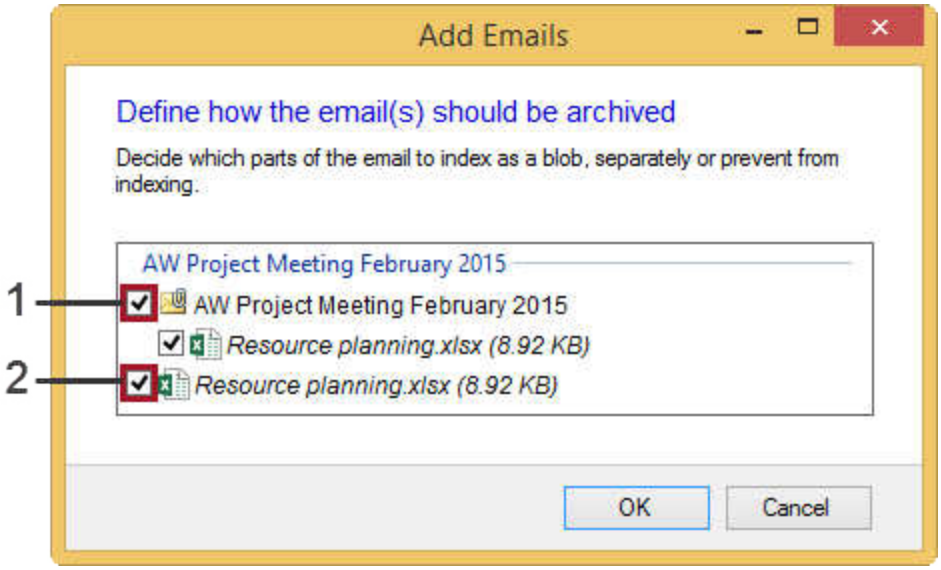



1. Hold down the **CTRL** key and **drag and drop** the e-mail onto the document pane or onto a file in the file pane.

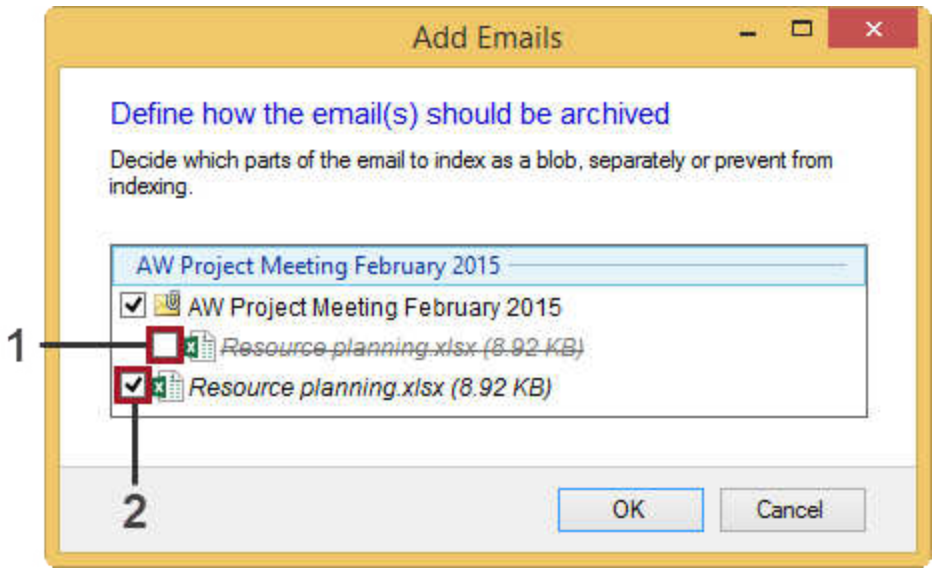
   The e-mail and the attachments will be listed separately in the dialog box that appears. By default, the e-mail and the attachments will be selected and stored together.


Add Emails
Define how the email(s) should be archived
Decide which parts of the email to index as a blob, separately or prevent from indexing.
AW Project Meeting February 2015
AW Project Meeting February 2015
Resource planning.xlsx (8.92 KB)
Resource planning.xlsx (8.92 KB)

   – If you want to store the attachment separately as well, leave the check marks at **(1)** and also enable the check box for the attachment at **(2)**.


Add Emails
Define how the email(s) should be archived
Decide which parts of the email to index as a blob, separately or prevent from indexing.
AW Project Meeting February 2015
AW Project Meeting February 2015
Resource planning.xlsx (8.92 KB)
Resource planning.xlsx (8.92 KB)
1
2
OK
Cancel

– If you want to store the attachment separately, remove the check mark at **(1)** and only enable the check box for the attachment at **(2)**.


Add Emails
Define how the email(s) should be archived
Decide which parts of the email to index as a blob, separately or prevent from indexing.
AW Project Meeting February 2015
AW Project Meeting February 2015
Resource planning.xlsx (8.92 KB)
Resource planning.xlsx (8.92 KB)
1
2
OK
Cancel

2. Click on **OK**.

You will then have to define the properties for each attachment being stored separately.

## 17.6 Viewing related documents

Say you have stored an e-mail and its attachment separately in the DMS and later on move the attachment to a different location. In cases such as these, how would you be able to find out which attachments originally belonged to which e-mails and vice versa?

The “Show related documents” function is designed for precisely this purpose. Since the DMS always retains the association between an e-mail and its attachment(s), this easy-to-use function can be used at any time.

- **Right-click** on the e-mail or attachment and then click on **Show related documents**.

The system will search for the e-mail and all associated attachments and show them in the list of search results.

# 18 Reminders as the key to being perfectly organized

## 18.1 What is a reminder?

By using reminders, you can make sure you do not miss any deadlines or appointments for actions stored in the DMS. Reminders are also good for pending actions that cannot be closed yet and for which you need a reminder.

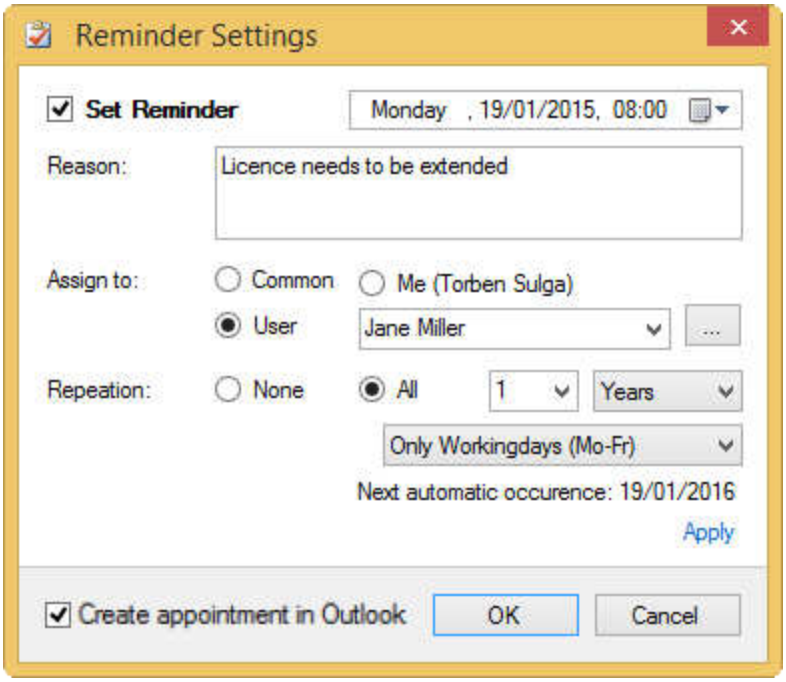
You can use reminders to “remind” yourself of documents and files, and can also have these reminders be entered into Outlook as an appointment with an appointment reminder. This way, the reminders from the DMS will be managed together with other appointments at a central location, that is, your Outlook calendar.

You can assign personal reminders to yourself or to another user.

Reminders can be one-time-only or can be repeated automatically (as a series).

When there is a reminder, the corresponding items will remain stored in their actual storage location. This is in contrast to forwarding, in which documents are moved to a different inbox.

*Example: Annual reminder for Jane Miller from Purchasing*




**Please note:**

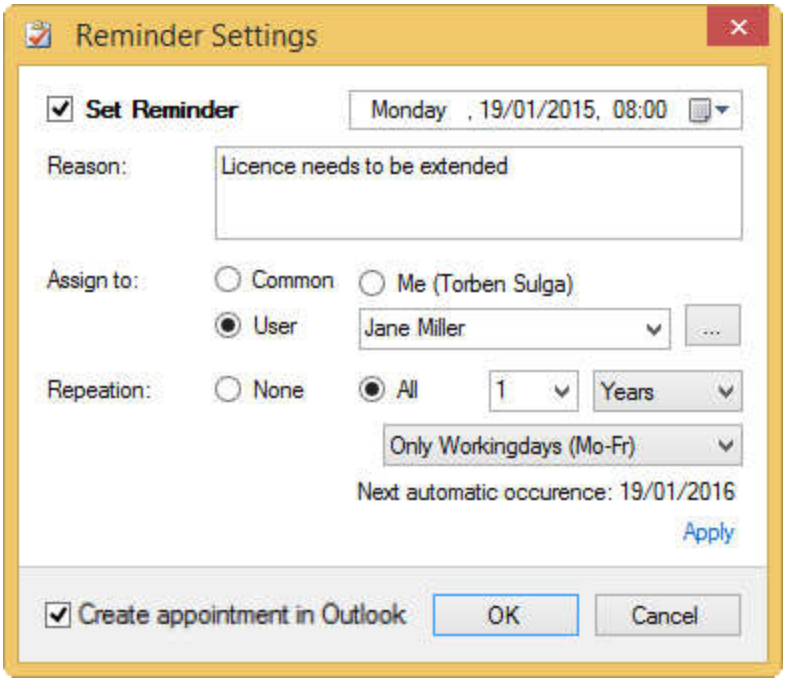
Depending on the system configuration, the **Tasks** folder in **My Workplace** will show all reminders that have not been dealt with until today or within an alternative period of time. For more information, please contact the system administrator.

## 18.2 Creating a reminder

You can set reminders for files and documents and add them as appointments to the Outlook calendar.

1. **Right-click** on the document / file and then click on **Reminder, Set Reminder**.

   The **Reminder Settings** dialog box will appear.




2. Select the **date for the reminder**. To set a reminder for the current day, click directly on the input field or enable the **Set Reminder** option.

   Important: Depending on how your solution is configured, it may be possible to specify a time in addition to the date.

3. Enter the **reason** for the reminder (optional) This description will be shown in the reminder overview and in the Outlook appointment.
4. You can assign the reminder as follows:
   - **Me:** The reminder will be for you personally
   - **User:** The reminder will be for the selected user and will be shown in their tasks
5. You can select from the following for the **Repetition** setting:
   - **None**: The reminder will be a one-time-only reminder
   - **All:** Select the interval (**Days, Weeks, Months,** or **Years**)
     You can also select one of the following additional sub-intervals: **Only Workingdays (Mo-Fr), Not on Sundays (Mo-Sa)**, or **All days (Mo-So)**

     The first occurrence for the reminder will be shown.

     Click on **Apply** for every additional occurrence.

6. If you want the reminder to be added to the Outlook calendar as an appointment, enable the **Create appointment in Outlook** option.

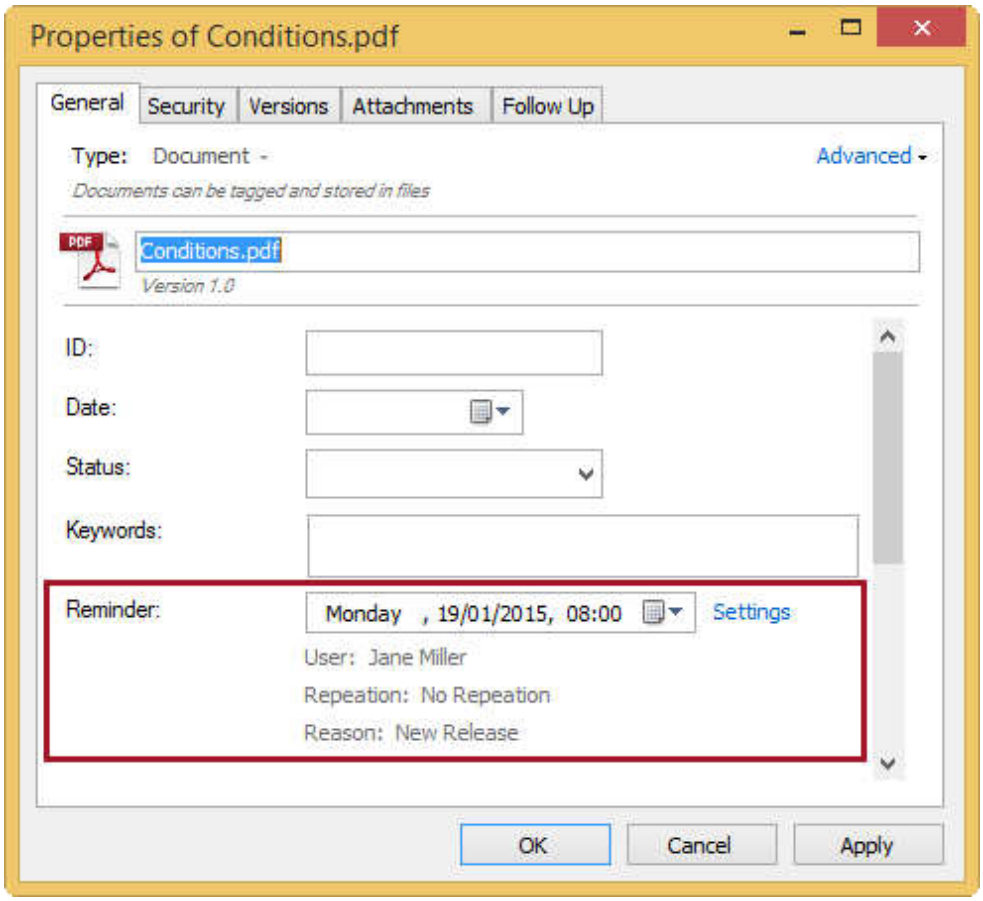
   Important: This option will only be shown if the **Synchronize reminders and terms with Outlook** option is enabled in **Settings, Synchronization**.

7. Confirm all your settings by clicking on **OK**.

## 18.3 Editing a reminder

You can edit all the settings for a reminder even after the reminder has already been created.

1. **Right-click** on the document / file and click on **Properties**.
2. In the properties, change the reminder's **date** or click on **Settings** to view all settings.




## 18.4 Viewing active reminders

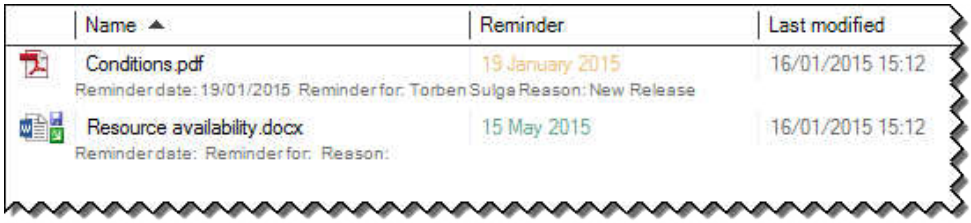
You can view active reminders if you want.

- Open the **Tasks** folder in your workplace.

  The task folder will show all personal reminders .

  Important: Only active reminders will be shown, i.e., reminders for **today or earlier**. To view future reminders as well, you will need to use the search for reminders.

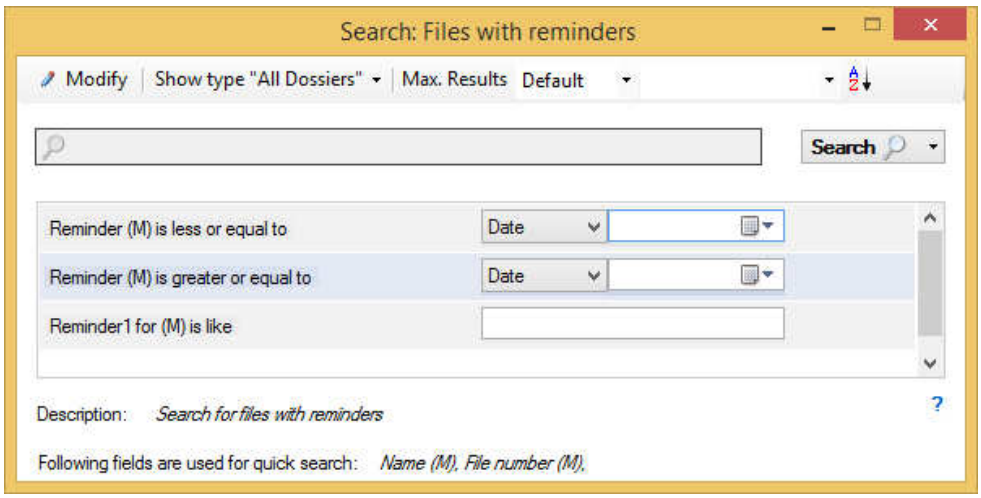
  The task list will show all the information regarding the reminder (date and reason).




## 18.5 Searching for reminders

The **Files with reminders** and **Documents with reminders** searches can be used to systematically search for reminders.

- Select the search you want in the toolbar, enter the date values that you want, and click on **Search**.




## 18.6 Deleting a reminder

Using the function below will delete the reminder for the document / file in the DMS, as well as the corresponding appointment in the Outlook calendar (if any).

- **Right-click** on the document / file and click on **Reminder, Delete Reminder Date**.

# 19 Using links

## 19.1 General information

A link (short for “hyperlink”) is a reference that makes it possible to jump directly to an item in the DMS. On the Internet, links are used to link websites to each other and to navigate between pages, for example.

You can create a link for any item in the DMS and send it by e-mail or save it in the Windows filesystem. In addition, items can be linked to each other. For example, you can store a link to a file in a different file, making it possible to quickly jump to the information for the first file.

## 19.2 Linking items

Documents, files, and registers can be linked to each other in a “cross-file manner”. For example, you can store a link to a file in a different file, making it possible to quickly jump to the information for the first file.

1. **Right-click** on the item you want and then click on **Copy** or use the **CTRL+C** shortcut.
2. **Right-click** on the target item and then click on **Paste Shortcut**.

   A link will be shown in one of the following ways, based on the relevant scenario:

   - **Cross-file links will be identified separately:**

     Documents: Document icon with an arrow on the bottom left corner:

     Files or registers: icon
   - **Links within the same file:** The link will not be identified separately, as the linked object is located within the same file structure.

## 19.3 Sending a link by e-mail

You can send a link to an item in the DMS by e-mail (file, register, document, e-mail). This link will be enclosed with the e-mail in the form of an attachment.

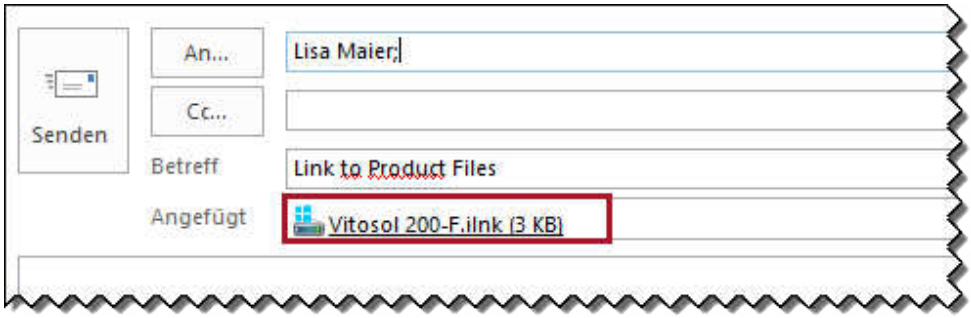
When the recipient clicks on the attachment (the link), the item from the DMS will be shown or opened (based on how the corresponding settings are configured).

**Please note:**

Please note that the recipient must have the required access permissions for the item in order to be able to open the corresponding link.

- **Right-click** on the item you want and then click on **Send to..., Email Recipient as Link, As New Email.**

  The link will be added to the e-mail as an attachment (*.ilnk).

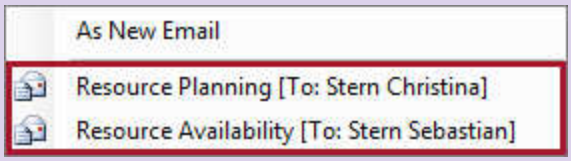



**Shortcut:**

Click on the **Send as Email** icon in the toolbar and then click on **Email Recipient as Link, As New Email**.

**Tip:**

To add the link to an e-mail that you have already written, select the e-mail from the choice list.
All newly created e-mails will be available for selection, as will be all the ones for which you clicked on “Reply.”




## 19.4 File as link

This function saves a link to an item (file, register, document, e-mail) in the Windows folder structure as an ***.ilnk** file outside the DMS. Double-clicking on the *.ilnk file will open the item in doculife Desktop.

1. **Right-click** on the item you want and click on**Send to..., File as link**.
2. Select the location for the link and click on **OK**
   .

## 19.5 Opening a link

**Please note:**

Please note that you will only be able to open a link if you have the necessary access permissions for the item.

- **Double-click** on the link in the e-mail (**.ilnk file**).

  Depending on the item in question and on the configured settings, the link will be opened as follows:

  - Files will be opened in the background and their contents will be shown in the document pane.
  - Registers will be selected in the background in the document pane, but will not be opened.

– Documents and e-mails will be selected in the document pane or the document will be automatically opened if the **Open item when link is opened** option is enabled in the settings.

  In this case, a prompt will appear asking whether you want to open the document for reading only or whether it should be checked out so that you can edit it.

# 20 Scanning documents

## 20.1 Overview

You can use the Outlook add-in's scanning function to scan paper documents to the DMS using your workstation.

After being scanned, the documents will be compressed, encrypted, and transferred for automatic full-text recognition processing (OCR) via HTTPS. Empty, unnecessary back pages will be automatically detected and deleted before the document is added to the DMS as a PDF.

The program supports all commercially available document scanners with an automatic document feeder, as well as flatbed scanners. The only requirement is that the devices used feature an industry-standard interface (ISIS or TWAIN).

**Please note:**

For a list of recommended scanners, please refer to the "doculife: Compatible Scanners" documentation.

**Please note:**

Follow the manufacturer's instructions when installing the scanner and the driver. If you have any questions, please ask your administrator.

**Please note:**

For a detailed description of how to connect and set up doculife ScanStation, as well as of how it works, please consult the "ScanStation manual."

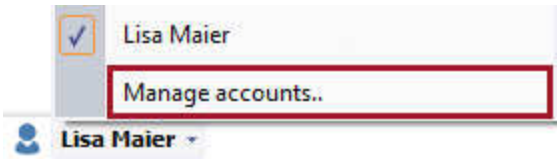
## 20.2 Activating the scanning function

Before you are able to scan documents with the program, the scanning function must be activated.

**Please note:**

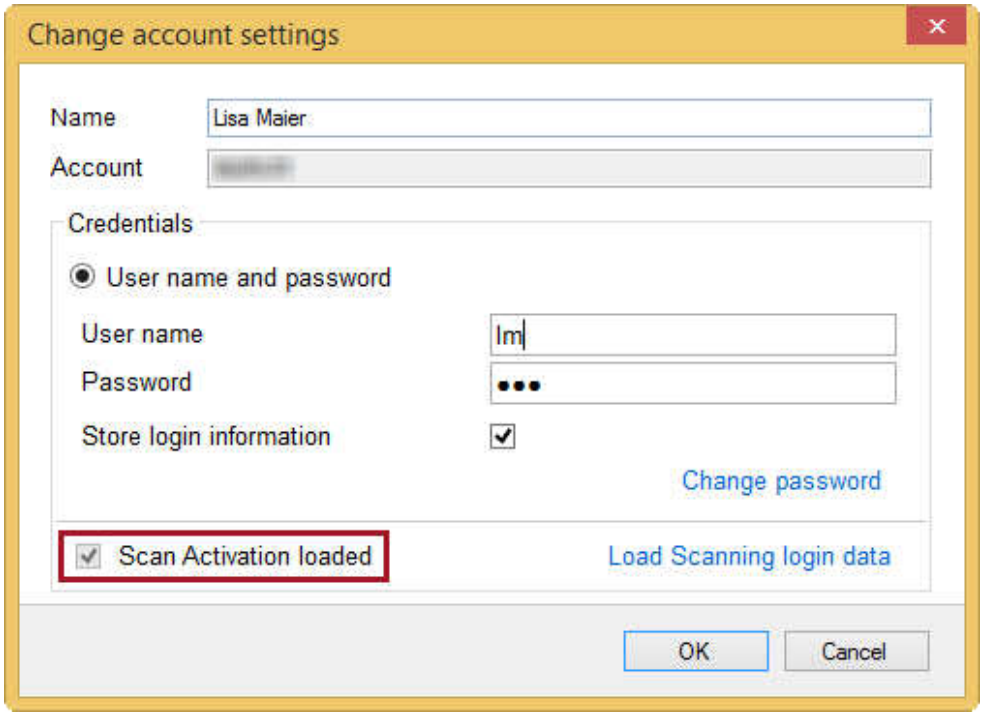
Depending on the program's configuration, the scanning function will be automatically activated when the user account is activated or it will have to be manually activated. The manual activation steps are described below.

1. In the Outlook add-in status bar, click on your username and then on **Manage accounts...**.




2. Select your user account and click on **Change**.

   If the scanning function is already activated, the **Scan Activation loaded** option will be enabled. If this is the case, you are done and can close the dialog box. Otherwise, proceed to step 3.




3. Click on **Load Scanning login data**.

   Windows File Explorer will open.

4. Select the scanning activation file (**.iasc, .iadc**) you received from your administrator and click on **Open**.

   The scanning function will be enabled.

5. Close the dialog box by clicking **OK**.

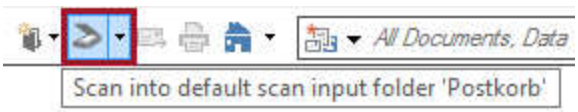
## 20.3 Setting a default scan input folder

Documents will be scanned to a previously defined scan input folder (this folder will be your personal inbox by default).

You can change the default scan input folder at any time.

To check which folder is currently selected as the default scan input folder, simply move the cursor over the scanner icon.

*Figure: Checking which folder is the default scan input folder*




1. **Right-click** on the file or register and select the **Set As Scanning Standard Folder** option.

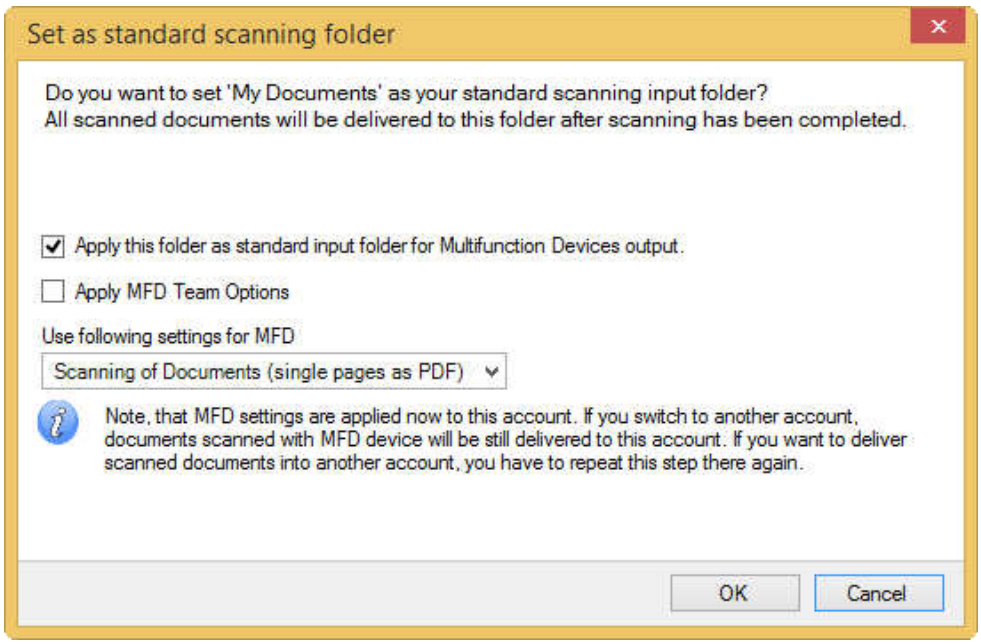
   The **Set as standard scanning folder** dialog box will appear.

2. Select:

- **Apply this folder as standard input folder for Multifunction Devices output.**: If you are using a multifunction device at the same time as a workstation scanner (or if you are only using a multifunction device) to store scanned documents in a directory on your workstation computer.

  If you are only using a workstation scanner, disable this option.
- **Apply MFD Team Options**: If there are multiple people who share a multifunction device and scanned documents are stored in a central directory (e.g., on a server).

  If you have any questions, please contact your administrator.


Set as standard scanning folder
Do you want to set 'My Documents' as your standard scanning input folder?
All scanned documents will be delivered to this folder after scanning has been completed.
Apply this folder as standard input folder for Multifunction Devices output.
Apply MFD Team Options
Use following settings for MFD
Scanning of Documents (single pages as PDF)
Note, that MFD settings are applied now to this account. If you switch to another account, documents scanned with MFD device will be still delivered to this account. If you want to deliver scanned documents into another account, you have to repeat this step there again.
OK
Cancel

5. Select the **scanning profile** that should be automatically used as a default when scanning.
6. Click on **OK**.

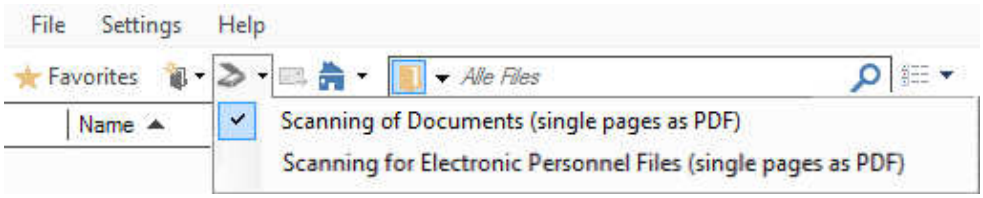
## 20.4 Scanning documents

Scanned documents are added to the DMS in PDF format. Their name will be automatically generated using the date (year, month, day), the scanning channel code, and an ascending scan number for the corresponding day.

**Example: Document name**

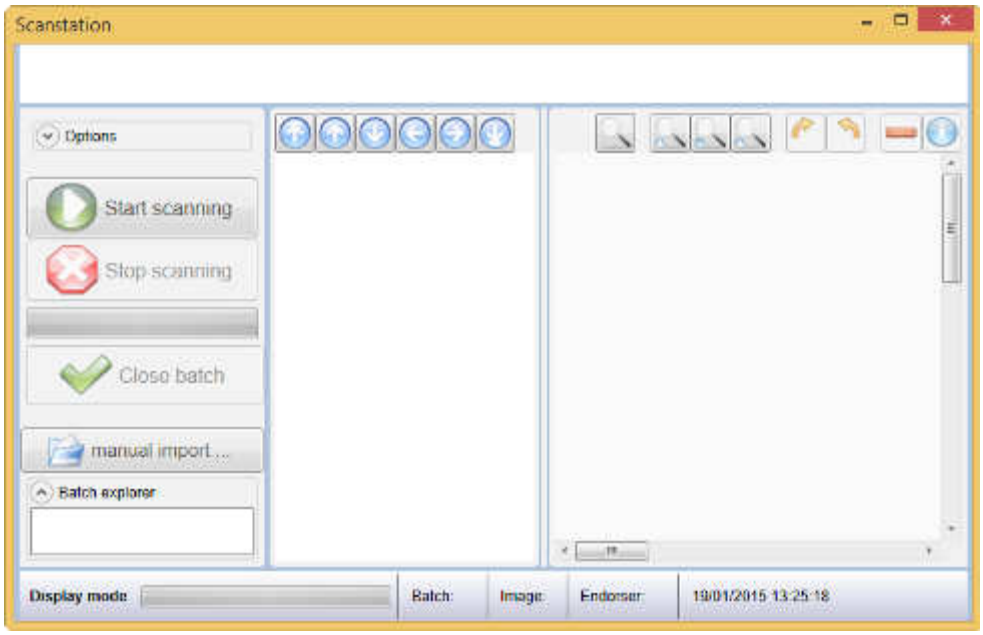
20130810-0031-000007, where
20130810 = October 10th, 2013
0031 = Scanning channel number 31
000007 = Document scan number (ascending number for the pages processed in a specific day)

1. Before scanning, make sure that you have selected the right scanning profile by expanding the choice list for the scanner icon. If necessary, change the scanning profile.




2. To start scanning, do one of the following:
   - To scan to the default scan input folder, click on the scanner icon in the toolbar.
   - To scan to a different scan input folder, **right-click** on the file / register you want and then click on **Scan into this folder**

     The scanning application will appear.




5. Click on **Start scanning** to start the scanning process

   The scanned documents will be shown on the right-hand side of the screen.
6. Once all documents have been scanned, end the scanning process by clicking on **Close batch.**

   You will then be able to continue scanning additional documents or close the ScanStation application.

**Please note:**

For a detailed description of doculife ScanStation and how it works, please consult the "ScanStation manual."

## 20.5 Distributing / moving documents from the inbox

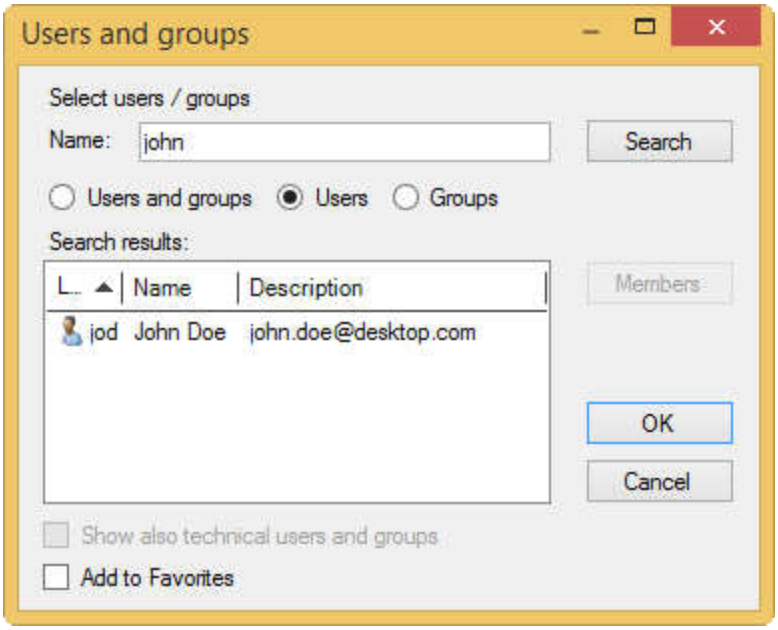
By default, scanned documents will be scanned to your personal inbox. From there, you can move the documents to the right file / register by **dragging and dropping** or **cutting** and

**pasting** them.

If you want to forward the documents to another user or user group, use the **Send to Inbox** function.

**Example:**
Say you are scanning a series of documents meant for several employees. You would start by scanning them to your personal inbox, from where you would then distribute the documents to the inboxes of the corresponding individual employees.

1. Open your inbox, select the documents you want, and **right-click** on them.
2. Click on **Send to Inbox, Inbox**.
3. Search for the users and/or groups you want.
4. Select the user / group to whom you want to distribute the documents and click on **OK**.




The documents will be removed from your inbox and moved to the selected user's / group's inbox.

# 21 Your personal recycle bin

## 21.1 How does the recycle bin work?

**Please note:**

Whether or not the recycle bin will be available will depend on the configuration for the tenant. If a recycle bin is not set up in the configuration, documents will be deleted immediately and it will not be possible to restore them.

When you delete a document in the DMS, it will be moved to the recycle bin and temporarily stored there until it is permanently deleted (just like with the Windows Recycle Bin).

Documents deleted by accident can be viewed in the recycle bin and can be easily restored to their original storage location.

**Please note:**

The recycle bin is not emptied automatically! Because of this, make sure to check your recycle bin and empty it from time to time.

If you delete a complete file and/or register, only the documents in it will be moved to the recycle bin. The file structure will be permanently deleted, as will be any links to documents.

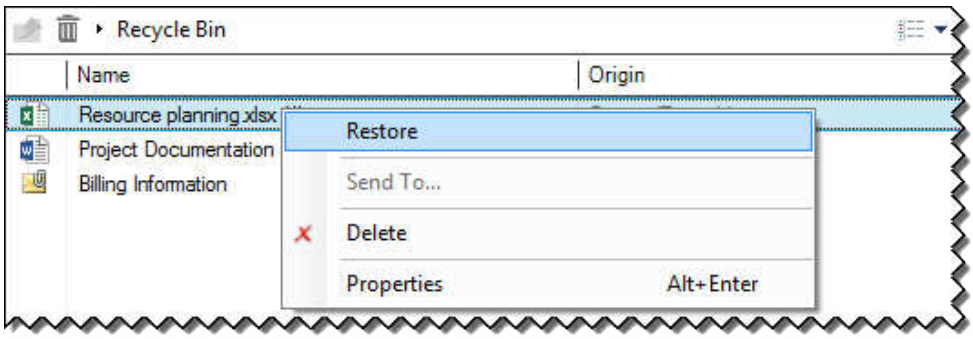
The recycle bin will show both the original storage location (Origin) and the time when the item was deleted.

*Figure: Recycle bin contents*

## 21.2 Restoring a document from the recycle bin

Deleted documents in the recycle bin can be restored to their original storage location.

1. **Double-click** on the recycle bin to open it.
2. Right-click on the document you want and then click on **Restore**.




The document will be removed from the recycle bin and moved to its original storage

location. Of course, the original storage location must still exist and the file / register must not have been deleted in order for this to be possible.

Important: If the document's original storage location does not exist anymore, you can simply **drag and drop** the document to its new storage location.

## 21.3 Permanently deleting a document in the recycle bin

When you delete a document, it will be moved to the recycle bin so that it can be restored later on if necessary.

If you want the document to be permanently deleted so that the space it occupies in the DMS will be freed up, you will need to delete the document from the recycle bin.

1. **Double-click** on the recycle bin to open it.
2. Follow one of the steps below:
   - Click on the document you want to delete and press the **DELETE** key. Confirm the deletion prompt.
   - **Right-click** on the document and then click on **Delete**. Confirm the deletion prompt.

**Tip:**

To delete all the documents in the recycle bin, press **CTRL + A** (Select All) and then press the **DELETE** key.

## 21.4 Emptying the recycle bin

You can empty the recycle bin and delete all its contents. When you do this, all the documents in the recycle bin will be permanently deleted and it will no longer be possible to restore them.

- Right-click on the recycle bin under **My Workplace**, click on **Empty Recycle Bin**, and then click on **Yes** in the prompt asking whether you are sure you want to delete the documents.

# 22 Views for files

## 22.1 What is a view?

Views affect how the contents in the document pane are shown and define the columns that should be shown, as well as their order.

**Please note:**

The views that are available will depend on the solution being used.

You can select a view for each file. The selected view will be saved with the file.

Moreover, you can select different views for each file and for each sublevel in a file.

Since the views depend on the solution being used, the way they work will be explained using the following “default views” as a basis.

- **Presetting** view
- **Compact view**
- **E-mail view**
- **Task view**
- **Journal view**
- **Default view**

The view that is used the most in the solution will be set as the default view.

You can customize the columns that should be shown for each individual view.

The following sections go over the various views.

## 22.2 Selecting a view

1. Select one of the following options:
   - **Right-click** on a file in the file pane.
   - **Right-click** on an empty area inside the document pane.
   - Click on the **Show view or filters** icon.
2. Click on the **View** command and select the view you want.

   The view configured for the corresponding display will be selected **by default**.

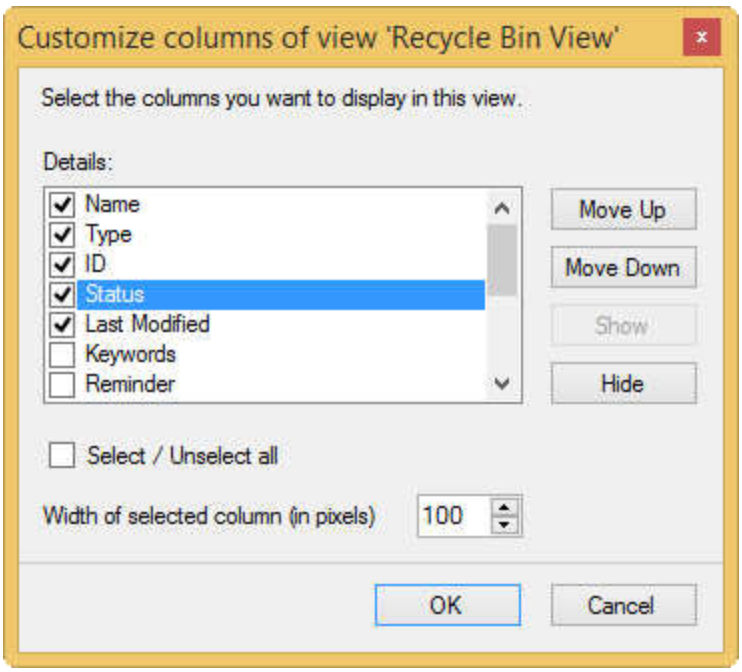
   The view selected will be for the level currently being shown.

## 22.3 Customizing a view

You can customize views and add/remove additional details to/from them, as well as change the order of these details.

1. Use one of the following methods:
   - **Right-click** on a file in the file pane.
   - **Right-click** on an empty area inside the document pane.
   - Click on the **Show view or filters** icon.

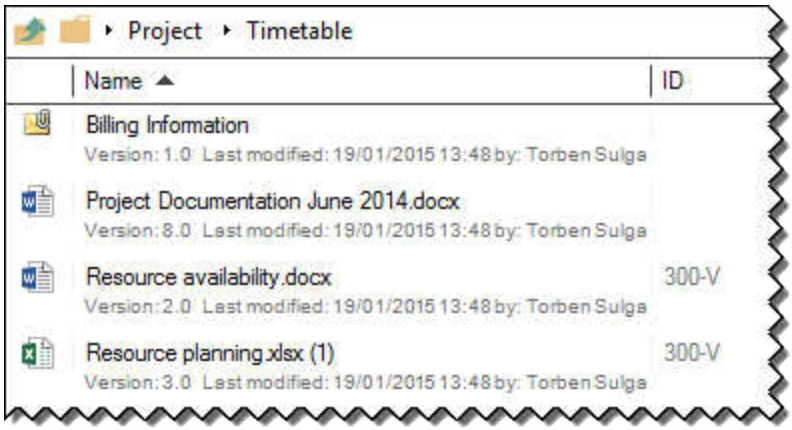
2. Click on **View, Customize...**
3. Enable/disable the properties you want and, if necessary, change their order by using the **Move Up / Move Down** buttons.




## 22.4 Which view is used for what?

### 22.4.1 Compact view

The compact view shows the properties of documents in a compact format in order to save space. To do this, it shows the version and the date when the document was last modified right under the document name (instead of next to it), for example.

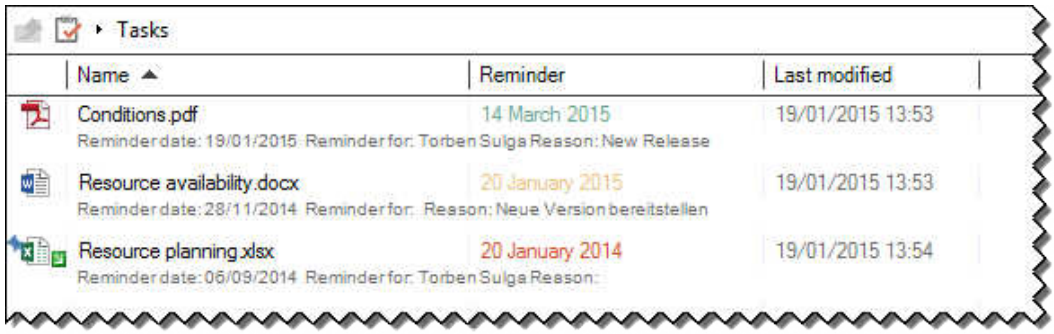



### 22.4.2 E-mail view

This view is ideal for cases in which a file predominantly contains e-mails, as it shows important e-mail properties (e.g., date received, sender, and subject).

### 22.4.3 Task view

The task view is used for the **Tasks** folder in **My Workplace** by default. Its main purpose is to show reminders.

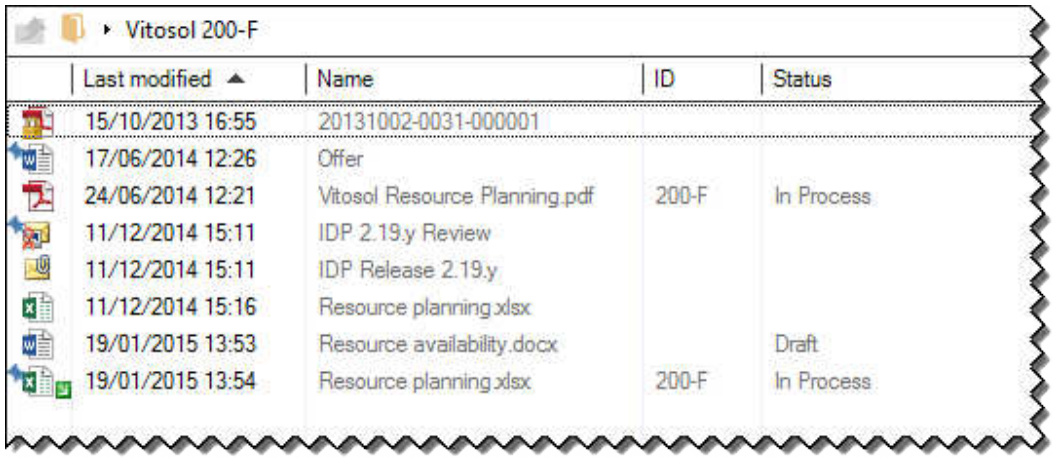



### 22.4.4 Journal view

The journal view shows all the items belonging to a file, sorted in ascending order based on the date when they were last modified. This view does not show register structures, meaning that every single file found in the file will be shown without any tree structure sublevels.

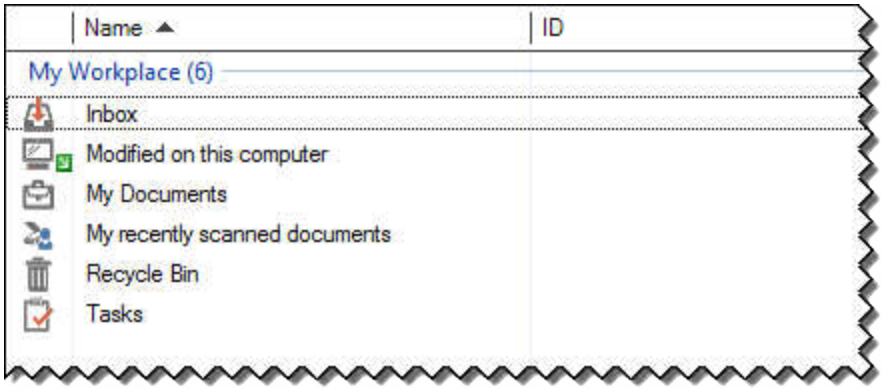
**Tip:**

Use this view to get a quick overview of all the contents found in a file.




### 22.4.5 Default view

The default view is used to display the items under **My Workplace** and is activated when you click on the **My Workplace** icon.


Name
ID
My Workplace (6)
Inbox
Modified on this computer
My Documents
My recently scanned documents
Recycle Bin
Tasks

# 23 All versions of a document at a glance

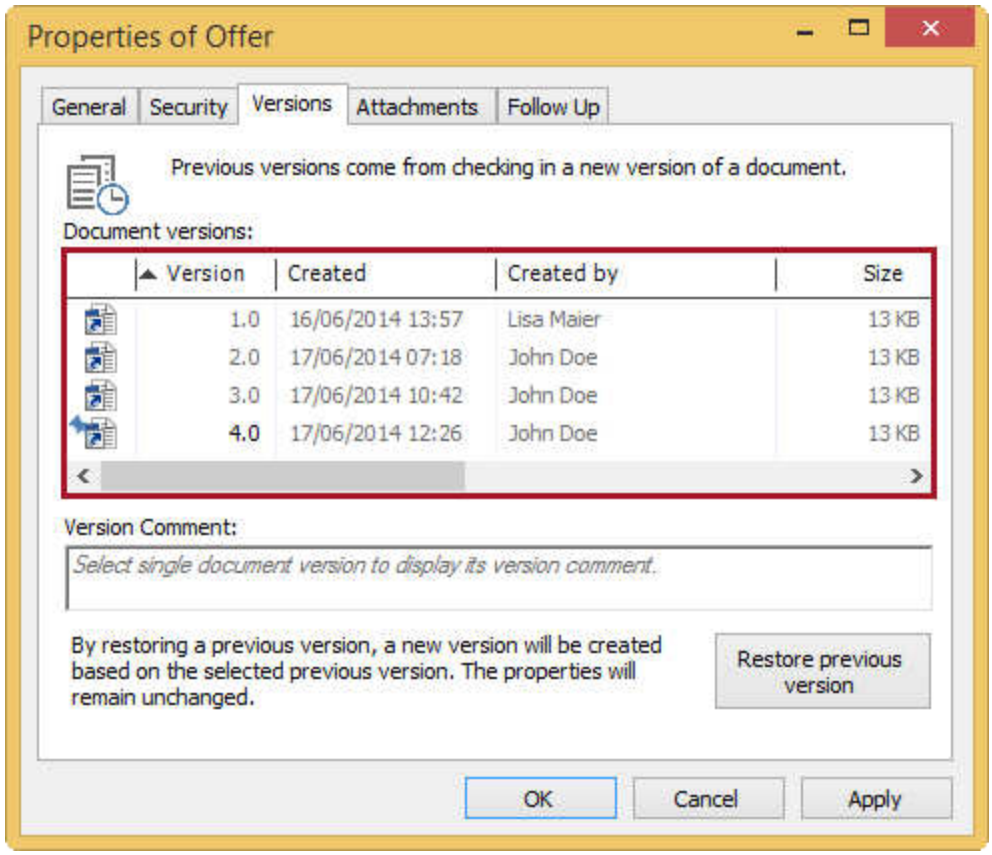
## 23.1 What are versions?

When you check in a document in the DMS, a new version will be automatically created for the document. To view all versions and restore one if necessary, use the version history functionality.

The program features a version history functionality that is used to log all changes to a document in a detailed manner and that makes it possible to track who changed a specific document and when.

By using this functionality, you can easily keep track of all the versions of a document without any of them getting lost. In addition, it eliminates the extra effort associated with searching for the “right” version, since you will always be working with each document’s latest version automatically. At the same time, you can use the functionality to access an older version at any time.

*Figure: Document versions*




The **Version Comment** field will show the comment that was entered when checking in the corresponding document version.

To open and view a version, simply double-click on it.

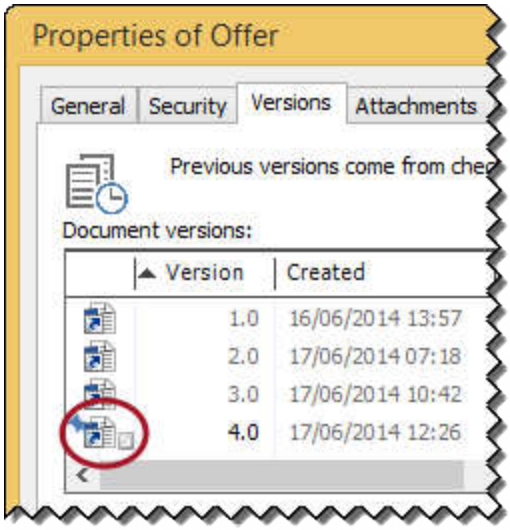
## 23.2 Viewing versions

You can show and open all the old versions of a document. However, old versions cannot be modified retroactively.

- **Right-click** on the document and then click on **Show versions**.

  All versions of the document will be shown, in ascending order.

  If you have checked out the document, the checked-out version will be identified with an arrow on a grey (instead of green) background.




  Open the old version you want by **double-clicking** on it.

**Tip:**

To view all the versions of a document, view the corresponding file in the **journal view**.

## 23.3 Restoring versions

In case of emergency, you can access an “old” version of a document and restore any old version you want.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. Select the old version you want and click on **Restore previous version** or right-click and then click on **Revert to version**.

   Important: The document must not be checked out at the time.
   A prompt will appear warning that the latest version’s contents will be replaced.
3. Click on **OK**.

   A new version will be created.

## 23.4 Saving versions in the filesystem

By using the function below, you can save any version of a document as a computer file or as a compressed ZIP file in the filesystem.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.

2. **Right-click** on the version and then click on **Send to...**
3. Select:
   - **File or Folder**: To save the version as a file in the filesystem
   - **Zipped File**: To save the version as a compressed ZIP file
   - **File as link:** To save the latest version as a link
     Important: This function will automatically save the latest document version. Old versions cannot be saved as links.
4. Select a storage location and a filename and click on **OK**.

## 23.5 Sending versions

The function below can be used to send any version of a document as an e-mail attachment.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. **Right-click** on the version and then click on **Send to...**
3. Click on **Email Recipient** to send the version as an attachment.

   Important: Old versions cannot be sent as **links** or **weblinks**. **Links** and **weblinks** will always point to the document's latest version.

## 23.6 Printing versions

The function below can be used to print out any version of a document.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. **Right-click** on the version you want and then click on **Send to...**, **Printer...**

   The printer selection dialog box will appear, at which point you can select the printer you want to use.

## 23.7 Deleting versions

You can delete versions that are no longer needed from the version history. Please note that doing so will also delete all notes and follow-up information (if any) for the corresponding document version.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. **Right-click** on the version you want to delete and then click on the **Delete** option or press the **DELETE** key.
3. In the prompt that appears, click on **OK**.
4. Click on **Yes** in the next prompt that appears.

## 23.8 Printing or saving the version overview

You can use the function below to print the version overview or save it in a variety of formats (Excel, for example).

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. **Right-click** on a version and then click on **Send to...**, **Send Hitlist to...**.
3. Select:

   - **CSV**: To save the list as a CSV file
   - **HTML**: To save the list as an HTML file
   - **Excel**: To save the list as an XLS file
   - **List Printer**: To print out the list

## 23.9 Viewing properties

The function below can be used to view the properties for a version. The properties of an old version cannot be modified retroactively.

1. **Right-click** on the document and then click on the **Versions** option.

   The **Properties** dialog box will appear with an overview of the corresponding versions.
2. **Right-click** on the version and then click on **Properties**.

# 24 Attachments: supplementing documents

## 24.1 What is an attachment?

If you want to supplement a document in the DMS with additional information or with additional separate documents, you can add an attachment to it. In a manner of speaking, these attachments will be “pinned” to the document so that all users who have access to the document will also be able to view the attachments.

You can add any documents from the filesystem, as well as text and audio notices, as attachments.

Attachments can be found by using the document search.

Documents with attachments are identified with a pin icon:

## 24.2 Adding attachments

### 24.2.1 Adding a computer file as an attachment

You can add any document from the filesystem as an attachment.

1. **Right-click** on the document and then click on **New Attachment** and **Attach File**.

   Windows File Explorer will open.
2. Select the computer file you want from the filesystem and click on **OK**.

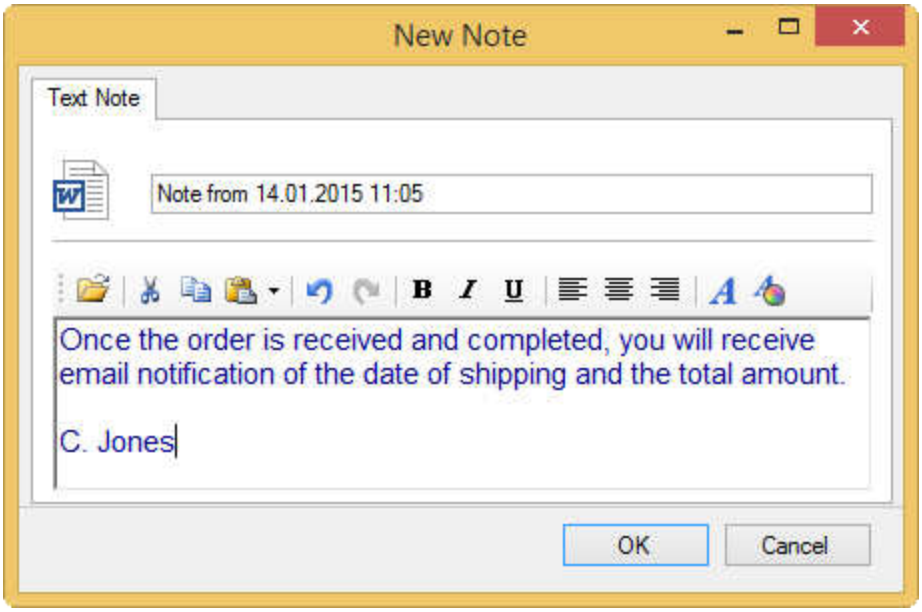
### 24.2.2 Adding a text note as an attachment

You can add a text note (the results from an agreement reached on the phone, for example) as an attachment directly in the DMS.

1. **Right-click** on the document and then click on **New Attachment** and **Text Note**.

   A text editor will open.
2. Enter the note’s title and content.

   You can use the usual text formatting functions (e.g., bold, italics) when typing your note.


New Note
Text Note
Note from 14.01.2015 11:05
Once the order is received and completed, you will receive email notification of the date of shipping and the total amount.
C. Jones
OK
Cancel

3. Click on **OK**.

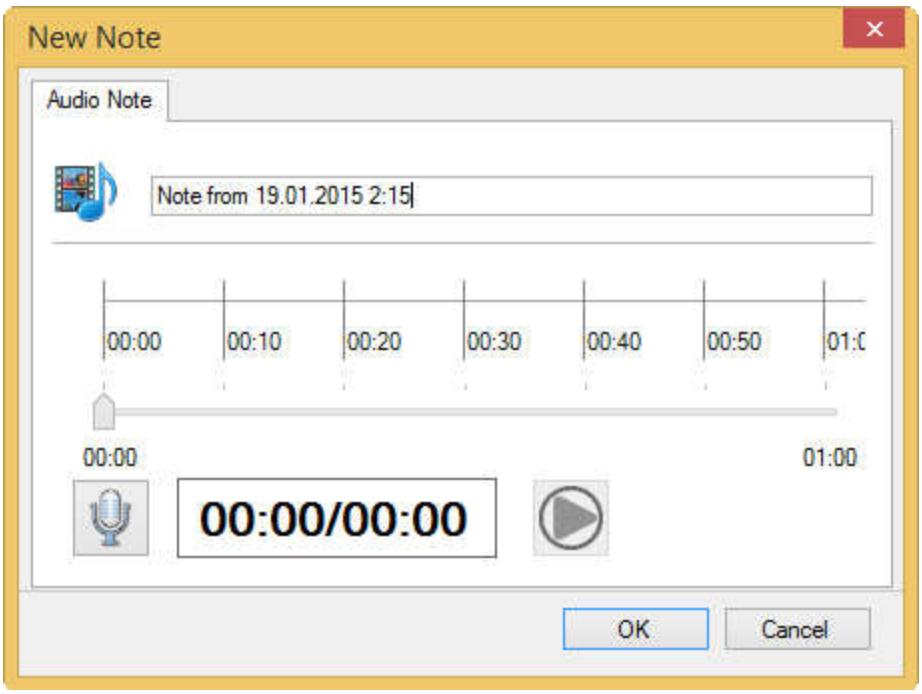
### 24.2.3 Adding an audio note as an attachment

If you want, you can record an audio note for the document directly in the DMS (for example: to record a dictation so that a document can be finished).

Important: Before recording, make sure to activate your laptop's microphone or connect your headset.

1. **Right-click** on the document and then click on **New Attachment** and **Audio Note**.

   An audio editor that you can use to record your audio note will appear.



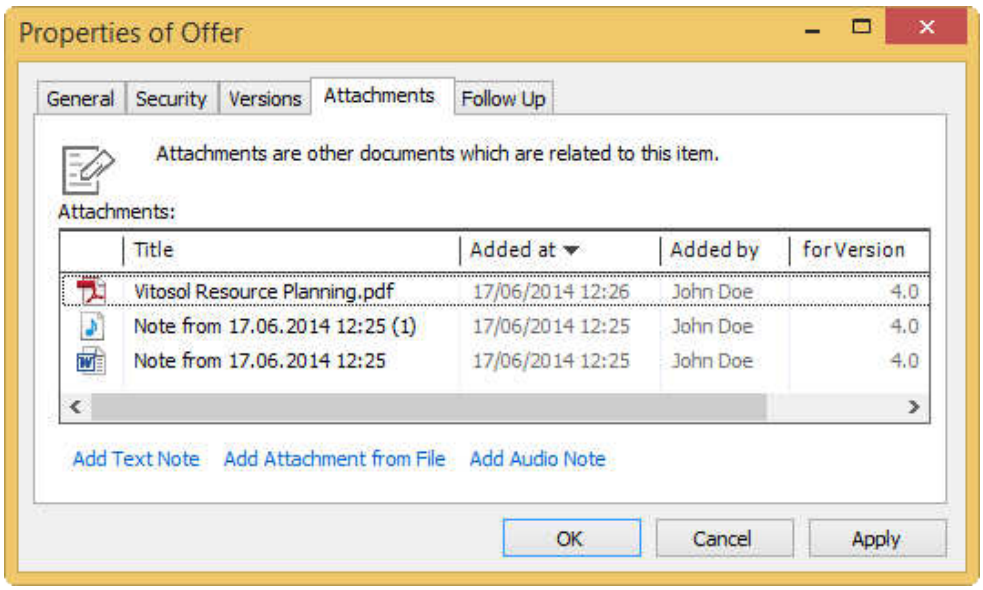
2. Click on **Start recording** and record your audio note.
3. To pause or finish recording, click on **Pause recording**.
4. To listen to your recording, click on **Play**.
5. Click on **OK** to save your audio note.

## 24.3 Opening an attachment

You can view and open the attachments for a document.

1. **Right-click** on the document and then click on the **Attachments** option.

   The **Properties** dialog box will appear with an overview of the corresponding attachments.




2. **Double-click** on an attachment to open it.

## 24.4 Deleting an attachment

1. **Right-click** on the document and then click on the **Attachments** option.

   The **Properties** dialog box will appear with an overview of the corresponding attachments.
2. **Right-click** on the attachment you want to delete and then click on the **Delete** option or press the **DELETE** key.

## 24.5 Saving an attachment in the filesystem

You can save an attachment as a computer file or as a compressed ZIP file in the filesystem.

1. **Right-click** on the document and then click on the **Attachments** option.

   The **Properties** dialog box will appear with an overview of the corresponding attachments.

2. **Right-click** on the attachment you want and then click on **Send to...**, **Folder** or save it as a **Zipped File**.
3. Select a storage location and a filename and click on **OK**.

## 24.6 Printing or saving the attachment overview

You can use this method to print the attachment overview or save it in a variety of formats (Excel, for example).

1. **Right-click** on the document and then click on the **Attachments** option.

   The **Properties** dialog box will appear with an overview of the corresponding attachments.
2. **Right-click** on the attachment and then click on **Send to...**, **Send Hitlist to...**.
3. Select:

   - **CSV**: To save the list as a CSV file
   - **HTML**: To save the list as an HTML file
   - **Excel**: To save the list as an XLS file
   - **List Printer**: To print out the list

# 25 Customizing access permissions

## 25.1 Introduction

doculife features an easy-to-understand, fine-grained, group-based permissions concept for files, registers, and documents that is designed with real-life applications in mind.

Access permissions for editing files, registers, and documents are grouped together in **user groups**. Users (employees) are assigned to these groups based on their responsibilities and authorization levels and are assigned permissions (data access and editing permissions) for their work in the DMS.

The following user groups will be defined in a doculife standard solution by default:

- Privileged
- Standard
- Restricted
- Guests

You can assign files and documents to various **confidentiality levels** (protection categories) in the DMS.

The following confidentiality levels will be defined in a doculife standard solution by default:

- Confidential: For confidential files and documents
- Standard: For day-to-day business files and documents
- Public: For generally accessible files and documents
- Only me: For files and documents to which only you will have access at first, but for which you can “unlock” access for other users in a targeted manner.

  Important: In a doculife standard solution, this confidentiality level will only be offered to privileged users.

## 25.2 How are access permissions managed?

Access permissions for a specific item (file, register, document) will **basically** depend on the following factors:

- Membership in a group
- The item’s confidentiality level

This yields the following permissions matrix:

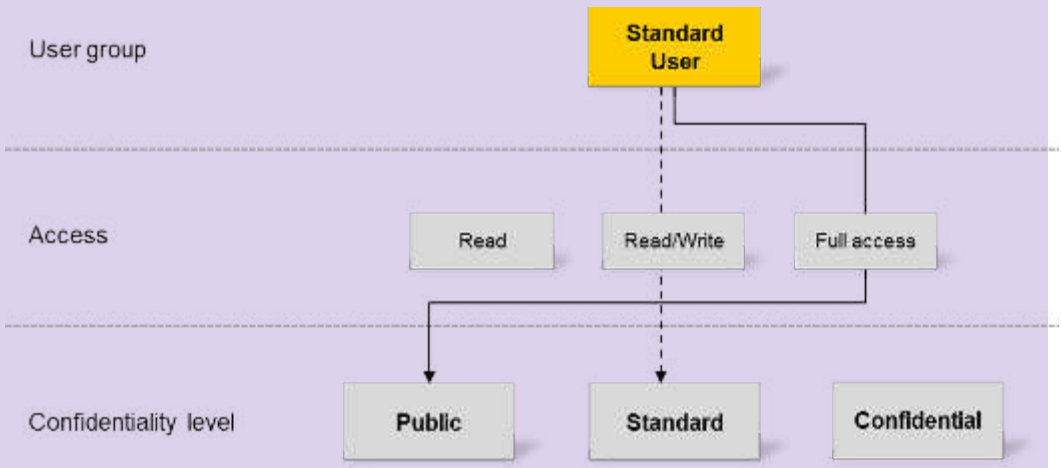
*Figure: Group permissions for specific confidentiality levels*

| Groups / Confidentiality | Privileged | Standard | Restricted | Guests |
|---|---|---|---|---|
| Confidential | Full access | No access | No access | No access |
| Standard | Full access | Read/write | Read | No access |
| Public | Full access | Full access | Read/write | Read |

**Example:**

In the “Personnel Files” solution, a user belonging to the “Standard” group has read and write access to files, registers, and documents with the “Standard” confidentiality level and full access to files, registers, and documents with the “Public” confidentiality level.

Moreover, they have no access to files, registers, or documents with the “Confidential” confidentiality level.




**Please note:**

The various confidentiality levels and user groups will depend on the solution being used. For more information, please consult the solution description.

**Please note:**

If you have any questions regarding the permissions concept, please ask your administrator.
For more information, please refer to the “doculife administration” manual.

## 25.3 Access permissions overview

There are a total of three basic access permissions:

- Read access
- Read/write access
- Full access

These access permissions include the permissions for the following actions:

| Access permission | Actions allowed |
|---|---|
| Read access | Searching for items<br>Reading item properties<br>Reading contents/documents<br>Reading access permissions<br>Reading versions and attachments |
| Read/write access | **In addition to the rights that come with read access:**<br>Editing items<br>Changing item properties<br>Checking documents in and out<br>Creating and deleting links<br>Creating new items |
| Full access | **In addition to the rights that come with read/write access:**<br>Deleting items<br>Setting/modifying access permissions<br>Changing an item's owner |

Access permissions apply to the current item and will be inherited by all of the item's contents and sublevels.

**Example:**

If you grant user A read/write permissions for the "Quotations" file, these permissions will automatically extend to all the documents and registers stored in the file.

## 25.4 Viewing access permissions

You can check which users/user groups have which access permissions for any item you want.

- **Right-click** on the item, click on **Properties**, and go to the **Security** tab.

  The following screenshot shows the access permissions for a document:

This overview provides the following information:

- **Type:** Allow (granted or inherited access permission) or Deny (access permission withdrawn)
- **Name:** Name of the user or user group
- **Access Rights:** The type of access permissions
- **Details:** Information showing when access permissions are inherited (due to being part of a group, for example), as well as details if the permissions are “custom” permissions.

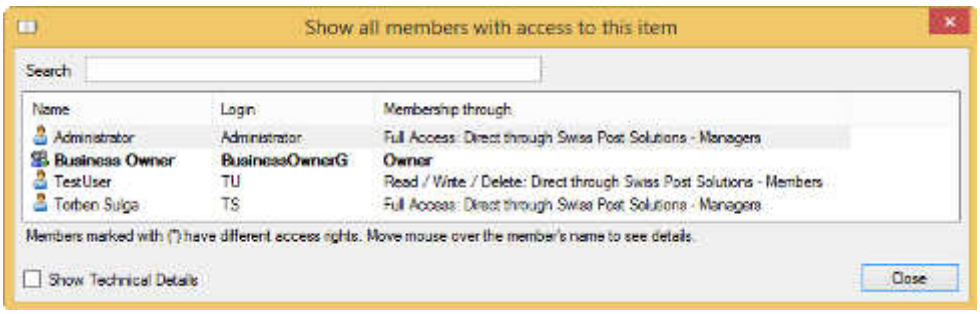
## 25.5 Showing all users with access to an item

**Please note:**

You will need specific permissions in order to be able to use this function. If you have any questions, please ask your administrator.

You can have the program show a list of all the users who have access to an item. This list will include all users who have access as a result of being members of a group, as well as all users to whom access has been explicitly granted.

1. **Right-click** on the item you want and then click on **Properties, Access Rights**.
2. Click on **Show all members with access to this item**.

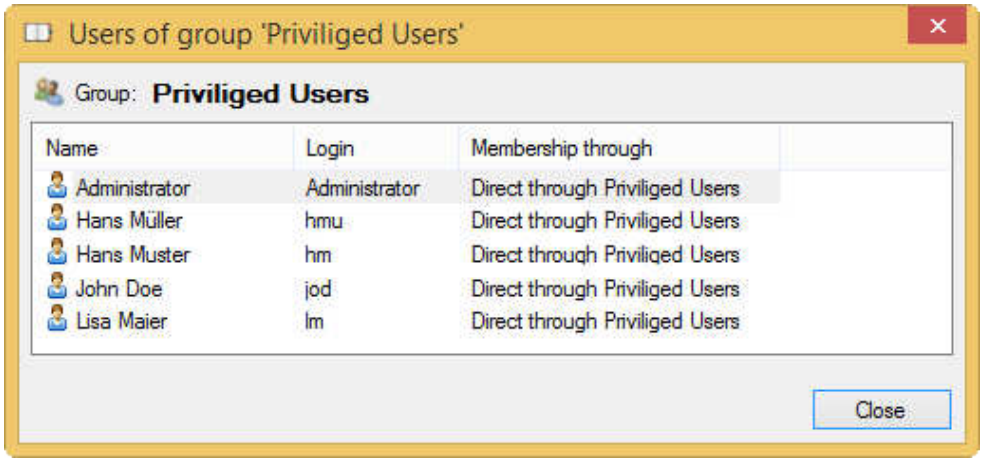



## 25.6 Showing group members

By viewing the access permissions in the program, you can see which users belong to a user group and have access permissions for a selected item.

1. **Right-click** on the item you want and then click on **Properties, Access Rights**.
2. **Right-click** on the group name and then click on **Show Members**.

   The list shown will show the users’ names and logins, as well as how they became a member of the group.

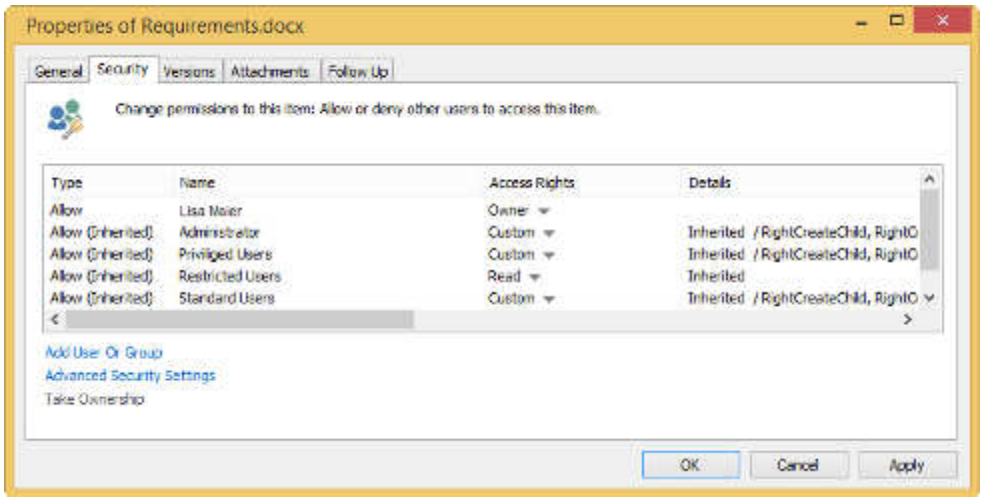



## 25.7 Granting access permissions

As the person who created an item / as a user with full access, you can grant access permissions for an item to another user or to a user group.

1. **Right-click** on the item you want and then click on **Properties, Access Rights**.

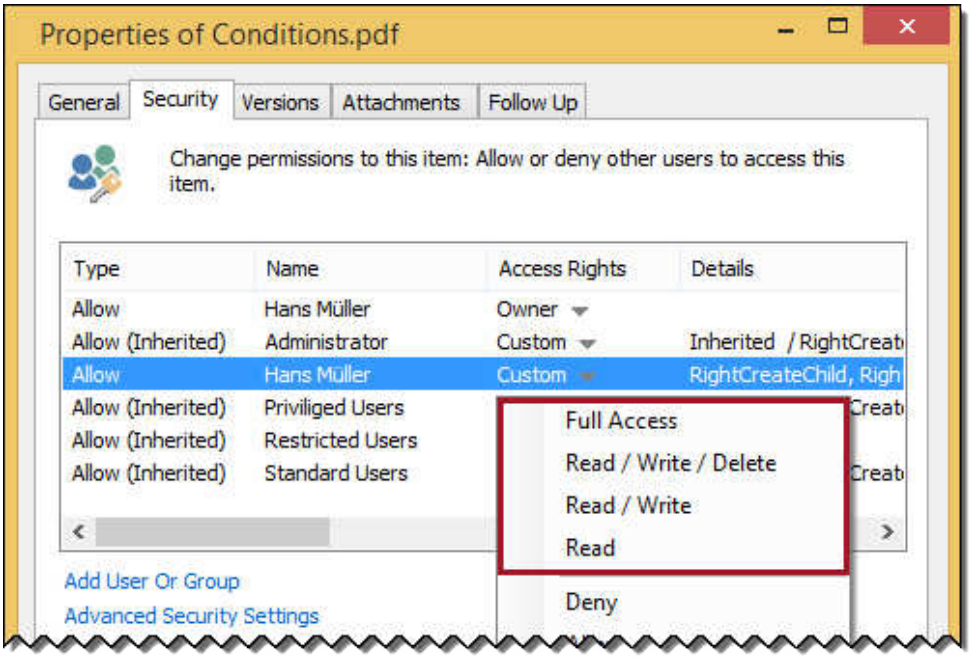
   The list will show who has access to the item already.




2. Click on **Add User or Group**.
3. Search for the user and/or group you want and add them by **double-clicking** or clicking on **OK**.

   The user will be automatically assigned **read/write access** permissions.

   To change these permissions, click on them and select the right ones from the choice list.




4. Click on **OK** and confirm that you changed the access permissions.

**Please note:**

Additional security settings can be configured in WebClient; click on **Advanced Security Settings**. WebClient will start.

## 25.8 Denying access permissions

You can explicitly deny access permissions.

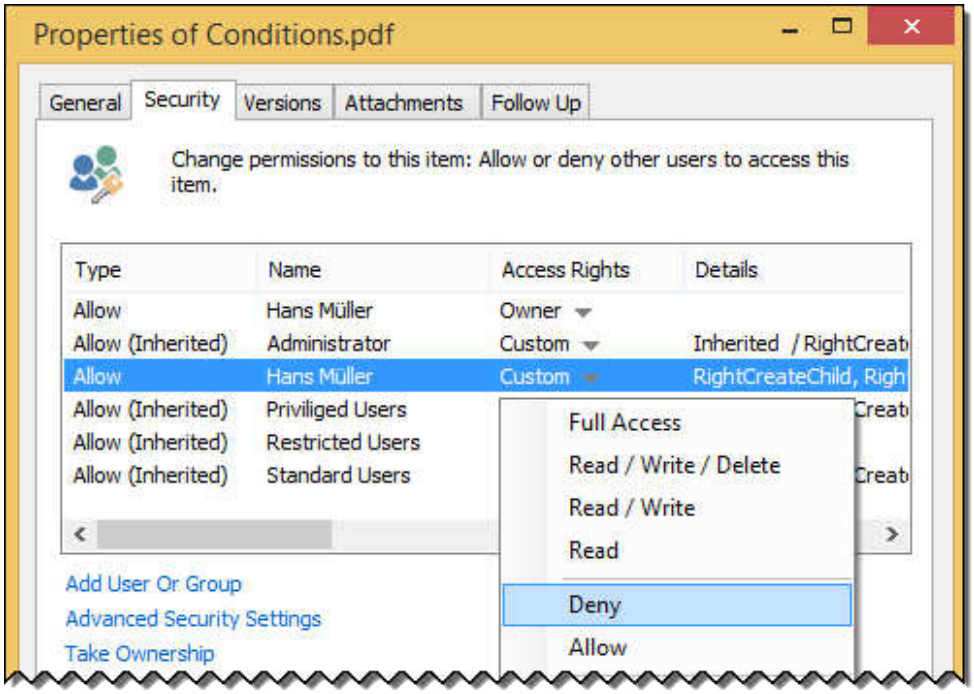
**Example:**

Say you grant user group B read/write access to a file. However, employee M, who is a member of the group, should not have any access to the file, so you explicitly withdraw their access permissions.

1. **Right-click** on the item you want and then click on **Properties, Access Rights**.
2. Click on **Add User or Group**.
3. Search for the user and/or group you want and add them by **double-clicking** or clicking on **OK**.

   The user will be automatically assigned **read/write access** permissions.

   To change these permissions, click on them and select **Deny** from the choice list.




4. Click on **OK** and confirm that you changed the access permissions.

## 25.9 Revoking access permissions

You can revoke access permissions for an object (provided you have the required permissions to do so).

Important: The user / group will no longer have any access to the item afterwards!

1. **Right-click** on the item you want and then click on **Properties**.
2. Click on the **Security** tab.
3. Right-click on the entry you want to delete and then click on **Delete User or Group**.

   Important: Inherited access permissions cannot be revoked.

# 26 Cross references to files and documents

## 26.1 What is a cross reference?

**Please note:**

The cross references available will depend on the solution being used.

Cross references are configurable actions available in the context menu for files and documents.

Basically speaking, cross references establish relationships between files and documents. Cross references are established by using specific property values (such as the supplier ID in the example below) that are inherited when a cross reference is created, as well as by using file types.

Cross references can be used to create new files and documents and connect them to the “starting item” (with the inheritance of property values, for example).

Cross references can be used to easily and quickly show connected files and documents.

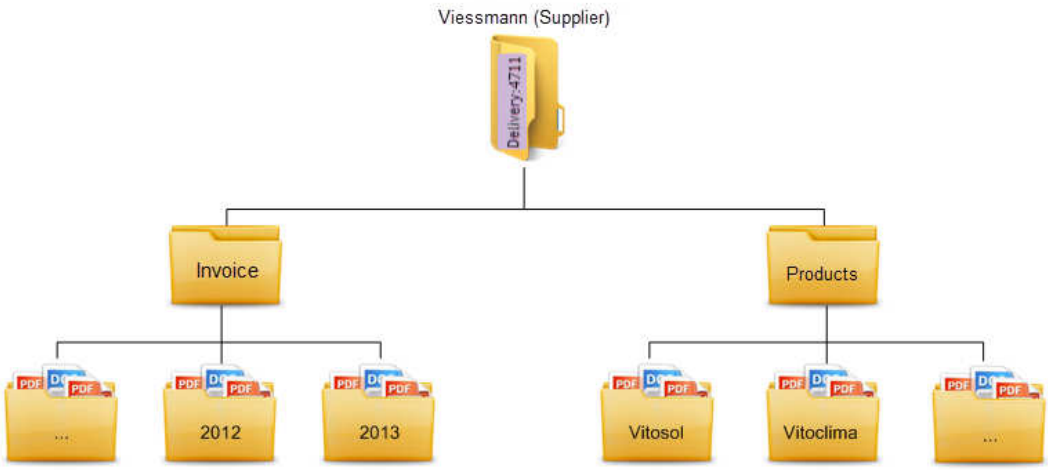
**Please note:**

The types of cross references that will be available are defined by the doculife Solution Designer in the system configuration.

**Example:** Say you need a file for all of a supplier’s invoices and another one for every single one of a supplier’s products.

This setup could be mapped as follows in a traditional, hierarchical storage structure:

*Example: Hierarchical storage structure with file and registers*



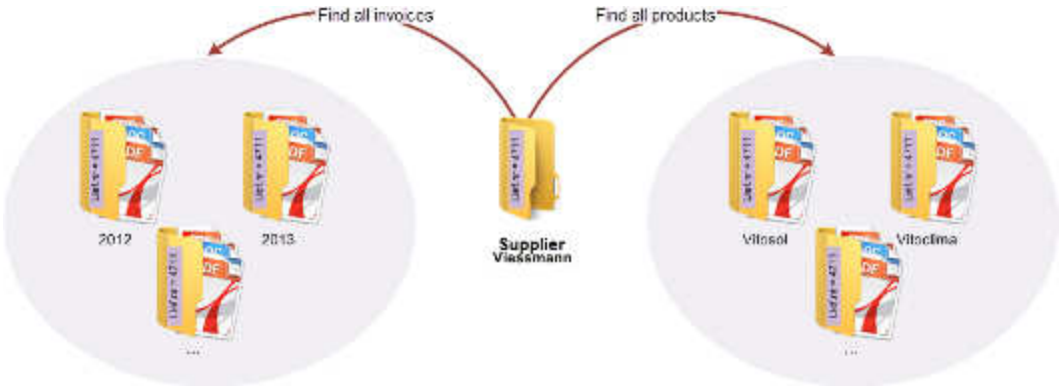

Cross references provide an alternative to hierarchical storage structures. From the supplier’s “main file,” you could use a cross reference to create a file of type “product” for each product and a file of type “invoice” for each invoice year.

All files would be located at the same storage level in the DMS and would be related to each other by means of the “supplier ID,” which would be automatically inherited.

*Example: Creating invoice and product files by using cross references*

With a single click, you would be able to view all the files related to the “main file” without having to know what what these files are called or where they are stored. In other words, this would make it extremely easy to show all the invoice and product files for a supplier.

*Example: Viewing all invoice and product files*



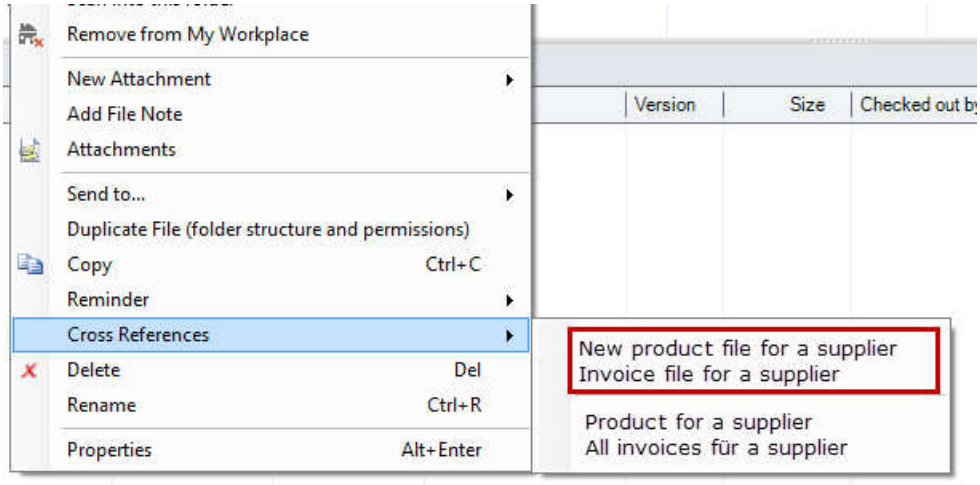

## 26.2 Creating a file cross reference

You can generate a new file or a new document from a file by using a **cross reference**.

**Please note:**

The types of cross references that can be created are defined by the doculife Solution Designer in the system configuration.

1. **Right-click** on the file for which you want to create a cross reference and then click on **Cross References**.
2. Select the cross reference you want (new product file for a supplier, for instance).




3. Enter the file's / document's properties and then click on **OK**.

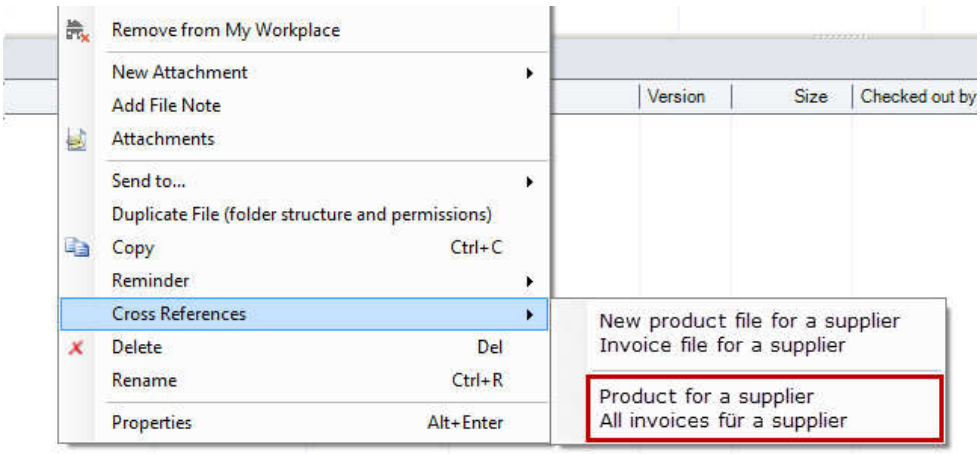
## 26.3 Viewing cross-referenced files / documents

You can view all cross-referenced files and documents from a file or document. The program will run an internal search that, for example, will search for all the files / documents with certain matching property values (supplier ID = 4711, for example) or with a certain type (files of type "Invoice," for example).

**Please note:**

The types of cross references that can be viewed are defined by the doculife Solution Designer in the system configuration.

1. **Right-click** on the file / document for which you want to see the cross references and then click on **Cross References**.
2. Select the cross reference you want (product for a supplier, for instance).




The cross referenced files / documents will be shown in the search results.

# 27 Document processing conflicts

## 27.1 How does a version conflict occur?

Version conflicts can occur when editing documents if, for example, the program finds a newer version of the document (in the DMS – that is, on the server) than the one you are working on on your computer.

**Example:**

Say user A checks out a Word document, edits it, and stores it locally ("Save" icon in Word). The modified document is now stored locally, but not in the DMS (on the server) yet.

User B cancels the checkout, edits the Word document, and checks it in as a new version.

Once this happens, user A's locally stored Word document will no longer match the version in the DMS (the version that user B checked in). This will result in a version conflict.

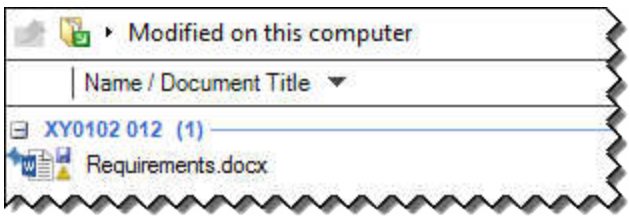
Conflicts can be fixed by using the **Resolve Version Conflict** function. This function will offer a number of solutions:

- Saving the modified document locally (as a file).
- Storing the modified document as a new document in the DMS.
- Storing the modified document as a new version in the DMS.
- Discarding local changes.

## 27.2 Viewing version conflicts

- Select **Modified on this computer** under **My Workplace**.

  Documents with a version conflict will be identified with the **floppy disk** (Modified on this computer) and/or **yellow triangle with !** (version conflict) icons.

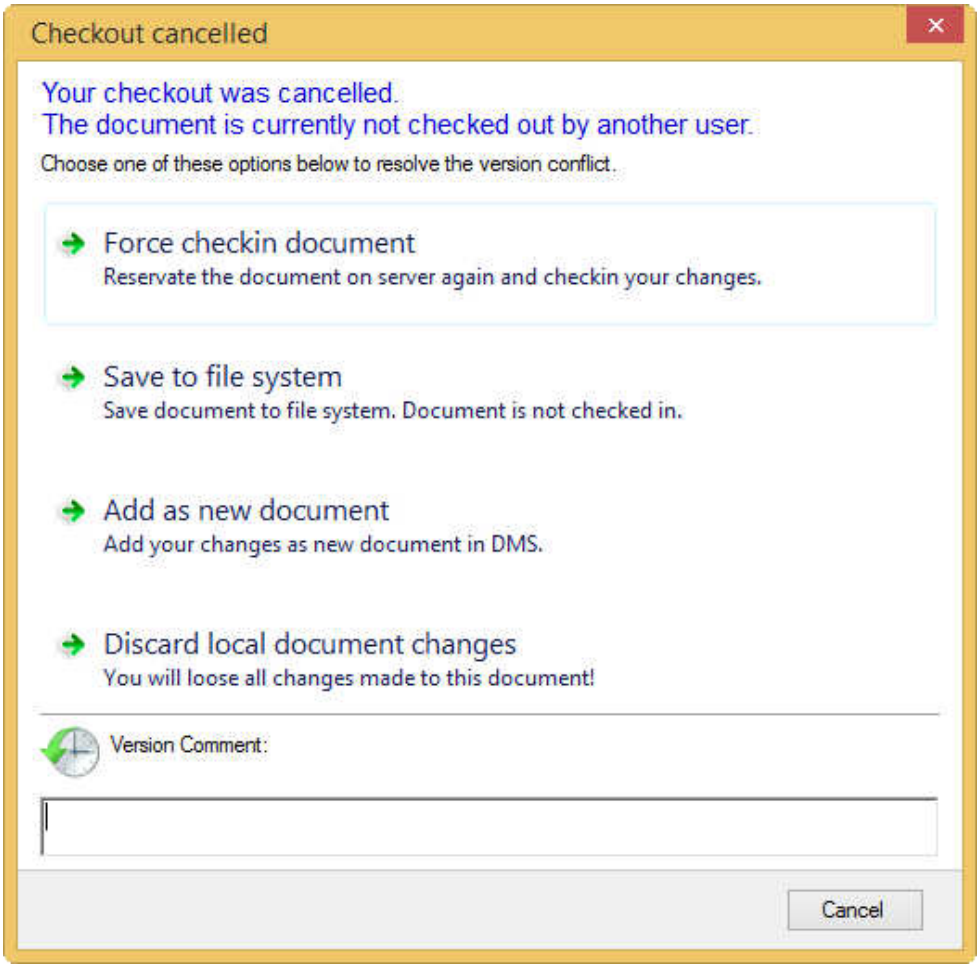



## 27.3 Fixing version conflicts

If the system detects a version conflict, it will offer options for fixing the conflict when the corresponding document is opened (at the latest). If necessary, however, you can start the process manually before that.

1. Either **right-click** on the document and then click on **Resolve Version Conflict** or **double-click** on the document.

   The **Newer document version found** dialog box will appear.


Checkout cancelled
Your checkout was cancelled.
The document is currently not checked out by another user.
Choose one of these options below to resolve the version conflict.
Force checkin document
Reservate the document on server again and checkin your changes.
Save to file system
Save document to file system. Document is not checked in.
Add as new document
Add your changes as new document in DMS.
Discard local document changes
You will loose all changes made to this document!
Version Comment:
Cancel

2. Select one of the following options:
   - **Save to file system:** Saves the document as a computer file in the Windows file-system. The changes you have made will not be checked in.
   - **Add as new document:** Saves the changes as a new document in the DMS.
   - **Overwrite document:** Overwrites the version on the server with the changes you have made.
   - **Discard local document changes:** Discards the changes you have made to the document (only stored locally up to this point).

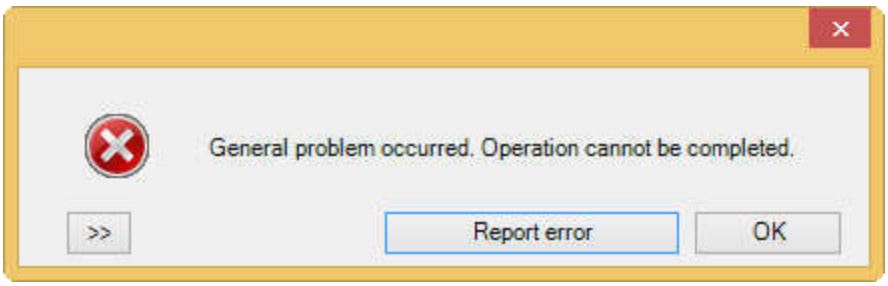
# 28 Reporting errors

## 28.1 What is an error report?

When an error occurs, you will get an error message. You can save the relevant information as an error report (also referred to as a bug report) in a ZIP file and then send the file to IT Support by e-mail.

This ZIP file will contain all the settings and log files that IT Support needs in order to analyze the problem.

*Figure: Error message*




## 28.2 Generating an error report

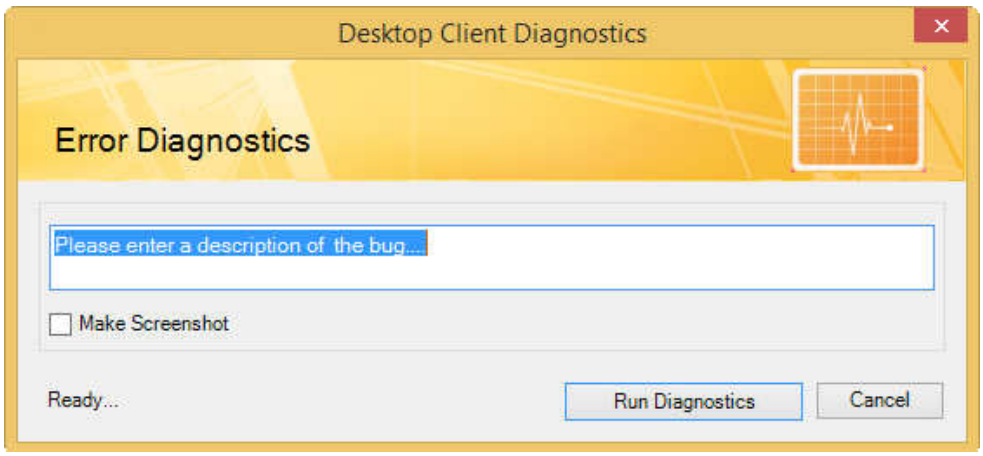
If you get an error message, you can immediately generate an error report containing the required information and forward it to IT Support later on for analysis.

1. Click on the **Report error** button.

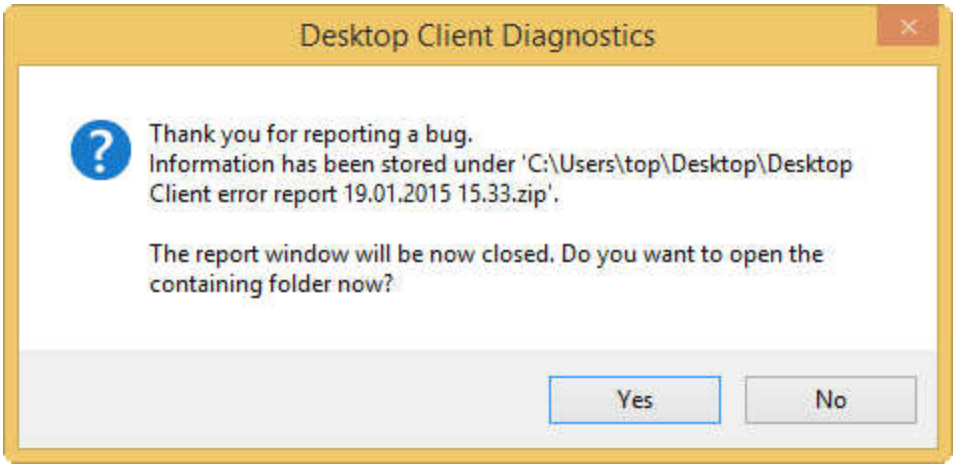
   If you want to see additional details regarding the error message, click on the **>>** button.

2. Enter an informative description, enable the **Make Screenshot** option, and click on **Run Diagnostics.**

   Important: When you enable the **Make Screenshot** option, an image of your screen will be generated and attached to the error report.




   The **Desktop Diagnostics** dialog box will appear and show the location and filename of the .zip file containing the report.


Desktop Client Diagnostics
Thank you for reporting a bug.
Information has been stored under 'C:\Users\top\Desktop\Desktop Client error report 19.01.2015 15.33.zip'.
The report window will be now closed. Do you want to open the containing folder now?
Yes
No

3. Click on **Yes** if you want to open the file path; otherwise click on **No** and the dialog box will be closed.

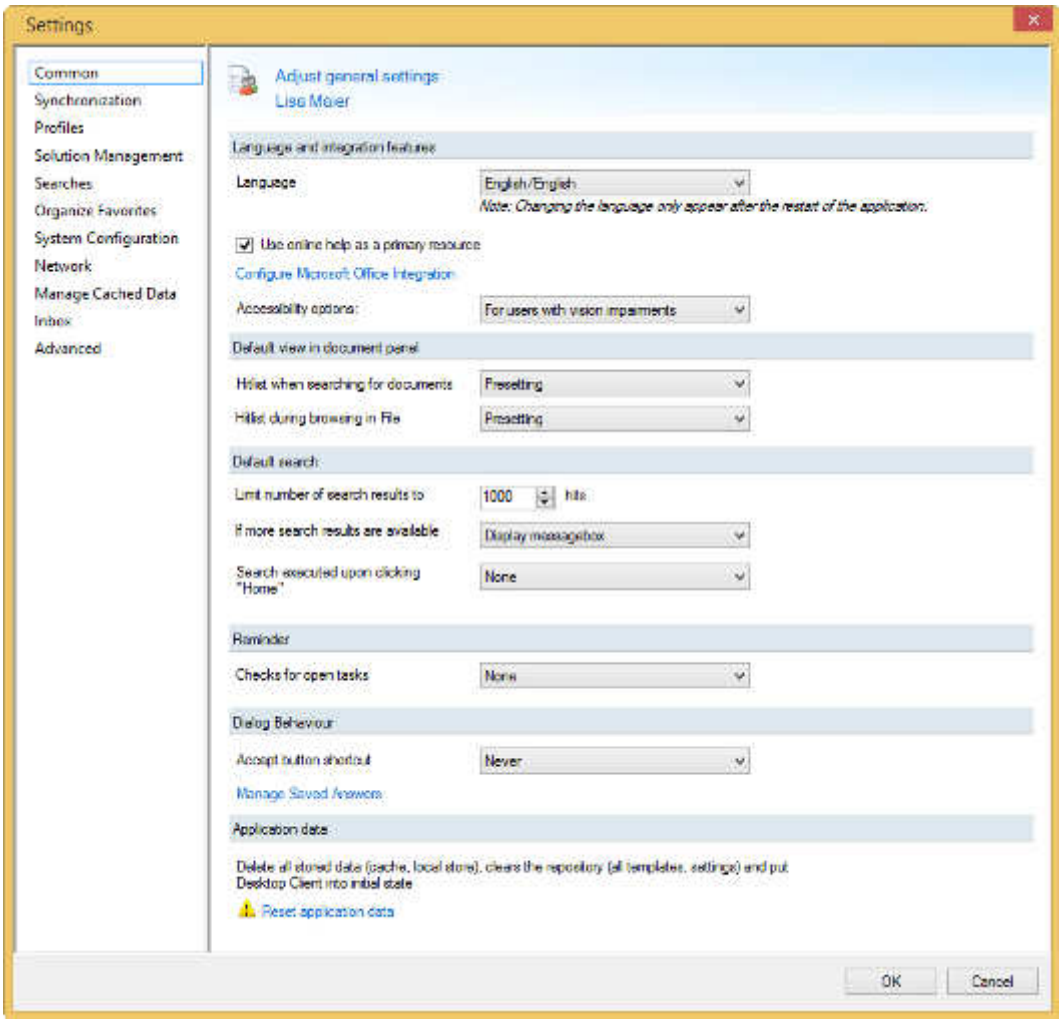
   Important: Once you are done, you will be able to find the ZIP file on your Windows Desktop and forward it by e-mail when you are ready.

# 29 Configuring settings

## 29.1 General information

### 29.1.1 Overview

The following sections go over the various options.




### 29.1.2 Language and integration features

**Language**

Used to select a language for the doculife Desktop user interface. The new language will not be enabled until after the program is restarted.

Available options:

- Use system language: Uses the operating system's language
  This is the default setting.
- German
- English
- French

- Italian
- Turkish

**Please note:**

The languages that are available will depend on the configuration being used.

**Use online help as a primary resource**

If you enable this option, the online help pages will be loaded from the server (default setting). This will ensure that you will always be using the latest version of the online help function. If the option is disabled, the program will use the local copy of the online help pages.

**Configure Microsoft Office Integration**

Used to enable/disable doculife Desktop integration into Microsoft Office

**Accessibility options**

- None (default setting)
- For users with vision impairments: Enables the accessibility options for users with vision impairments.

### 29.1.3 Default view in document panel

**Hitlist when searching for documents**

Defines the default view for search results when running a document search.

Available options:

- Presetting: The template's presetting will be used.
  This is the default setting.
- Compact view
- E-mail view
- Journal view
- Default view

**During browsing in file**

Defines the default view for navigating within a file.

Available options:

- Presetting: The template's presetting will be used.
  This is the default setting.
- Compact view
- E-mail view
- Journal view
- Default view

**Please note:**

Additional views may be available depending on the specific solution being used.

### 29.1.4 Default search

**Limit number of search results to:**

Limits the number of search results that will be shown for a single search. The maximum number of results that can be shown is 5,000. This value will be set to 1,000 by default.

**If more search results are available:**

Used to specify how the user will be notified whenever the search results exceed the maximum number allowed.

- **None:** A message will not be shown even if the number of results exceeds the maximum number allowed.
- **Display tooltip**: A tooltip will be shown when the number of results exceeds the maximum number allowed.
- **Display messagebox**: A message will be shown when the number of results exceeds the maximum number allowed. You will need to confirm this message. This is the default setting.

**Search executed upon clicking "Home":**

Used to specify whether the workplace's contents should be shown and all search results reset (**None** setting) or whether a search should be run after doculife Desktop starts or the user clicks on **Home**.

### 29.1.5 Reminders

**Checks for open tasks**

Used to specify whether a reminder for tasks/documents in the Tasks folder should be shown when closing doculife Desktop.

**Please note:**

The list of tasks folders shown will depend on the specific solution being used.

- **None:** A reminder will not be shown
- **Name of tasks folder:** A reminder will be shown if there are any tasks/documents in the folder

### 29.1.6 Dialog behaviour

**Accept button shortcut**

If you prefer working with your keyboard, you can set a keyboard shortcut that will be the equivalent of clicking on the **OK** button in dialog boxes.

The following options are available:

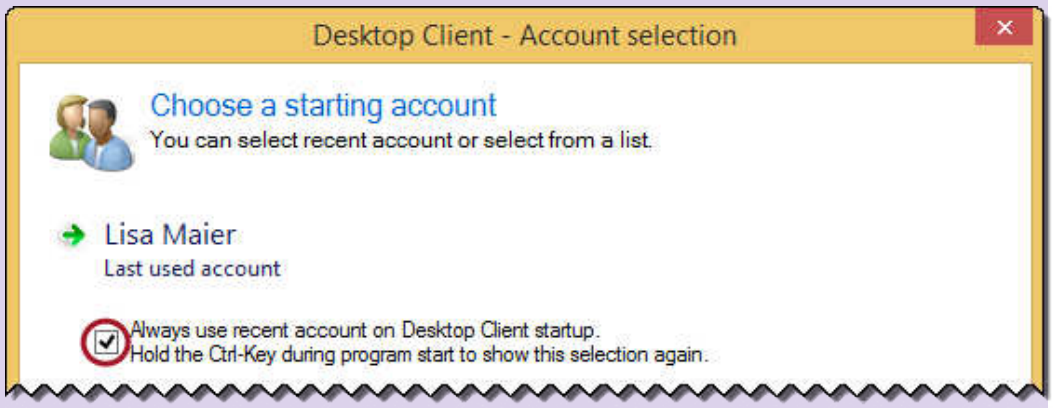
- **Never**: When this option is selected, no keyboard shortcut will be set for this purpose. This is the default setting.
- **on Enter**: The **ENTER** key will be the equivalent of clicking on OK
- **Ctrl+Enter**: The **CTRL+ENTER** shortcut will be the equivalent of clicking on OK

### Manage Saved Answers

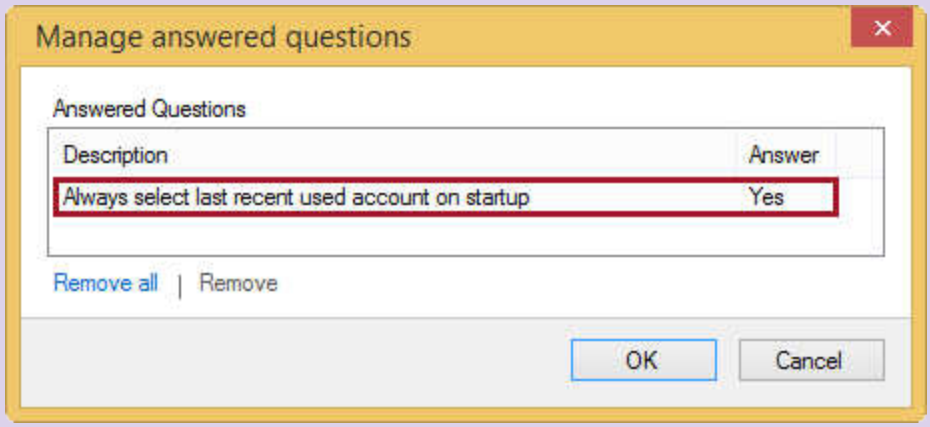
There are a variety of dialog boxes that can be used to enable options once so that they do not have to be configured again. By clicking on this option, you can see which setting was selected and reset it to its original value if necessary.

**Example:**

If you have set up multiple accounts, doculife Desktop will ask you which account you want to use when starting. At this point, you can enable an option that will ensure that the account you last used will always be used automatically so that this dialog box will be skipped the next time you start the program.


Desktop Client - Account selection
Choose a starting account
You can select recent account or select from a list.
Lisa Maier
Last used account
Always use recent account on Desktop Client startup.
Hold the Ctrl-Key during program start to show this selection again.

In this case, **Yes** (option enabled) will be stored as the answer under Answered Questions. You can click on **Remove all / Remove** to reset saved options. For example, doing so in this example would make the program show the Account selection dialog box the next time the user logs in.




## 29.1.7 Application data

### Reset application data

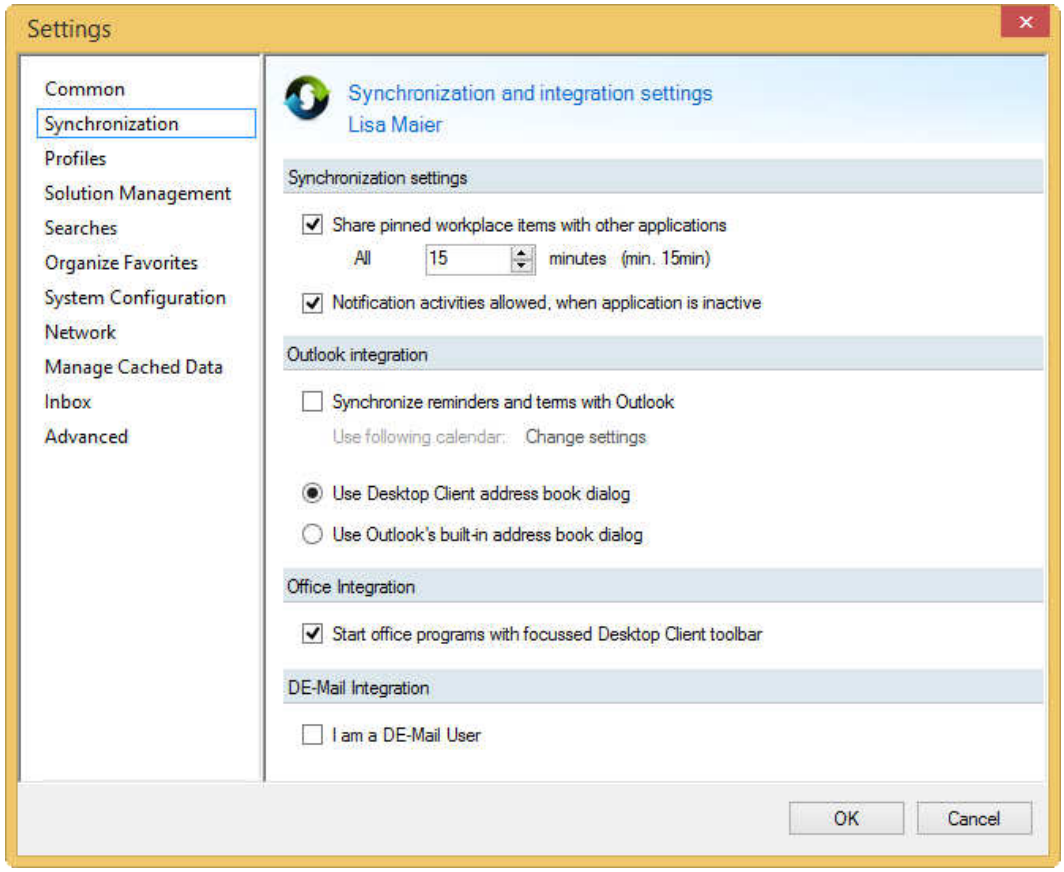
If you run into errors, you can use this function to reset all the customized settings that you have configured in doculife Desktop. This will include not only all settings, but also a user's favourites and most recently used items (files and documents will be unaffected).

After running this function, you will need to log in to doculife Desktop with your information once again.

## 29.2 Synchronization

### 29.2.1 Overview

The following sections go over the various options.




### 29.2.2 Synchronization settings

**Share pinned workplace items with other applications**

If this option is enabled (default settings), the pinned files and folders under **My Workplace** will also be shown in doculife MobileClient or on another computer if you log in to them using your user information.

If the option is disabled, the pinned files and folders will only be visible on the computer you are currently on (under **My Workplace**).

**All X minutes**

This setting applies to **My Workplace** and to the **Libraries**.

Used to specify the interval at which **My Workplace** and **Libraries** will be automatically checked for changes and updated. The default setting is 60 minutes.

If this function is enabled, you can configure, for each individual library, whether it should be synchronized or not. This can be used to “freeze” the current version of a library.

This can be a useful option when a library is created for a team and will not be subject to any more changes, in which case you would disable automatic updates for the library.

**Notification activities allowed, when application is inactive**

If this option is enabled, background activities will be performed even if doculife Desktop is not the active window.

### 29.2.3 Outlook integration

**Synchronize reminders and terms with Outlook**

If you enable this option, reminders will be automatically added to the Outlook calendar as an appointment with an appointment reminder.

If you want to use your personal Outlook calendar, then no additional settings need to be configured.

**Use following calendar**

Can be used to integrate additional Exchange calendars. For more information, please contact your administrator.

**Use doculife Desktop/Outlook's built-in address book dialog**

Depending on the solution being used, the program can be configured in such a way that a contact person from the Outlook contacts can/must be assigned when properties are being entered. This option determines whether the normal Outlook default dialog box or the doculife-specific one will be shown in this case.

### 29.2.4 Office Integration

**Start office program with focussed doculife toolbar**

If you enable this option, the doculife Desktop ribbon will be automatically enabled when you open a checked-out Office document, provided Office integration is enabled.

### 29.2.5 De-Mail integration

**I am a De-Mail User**

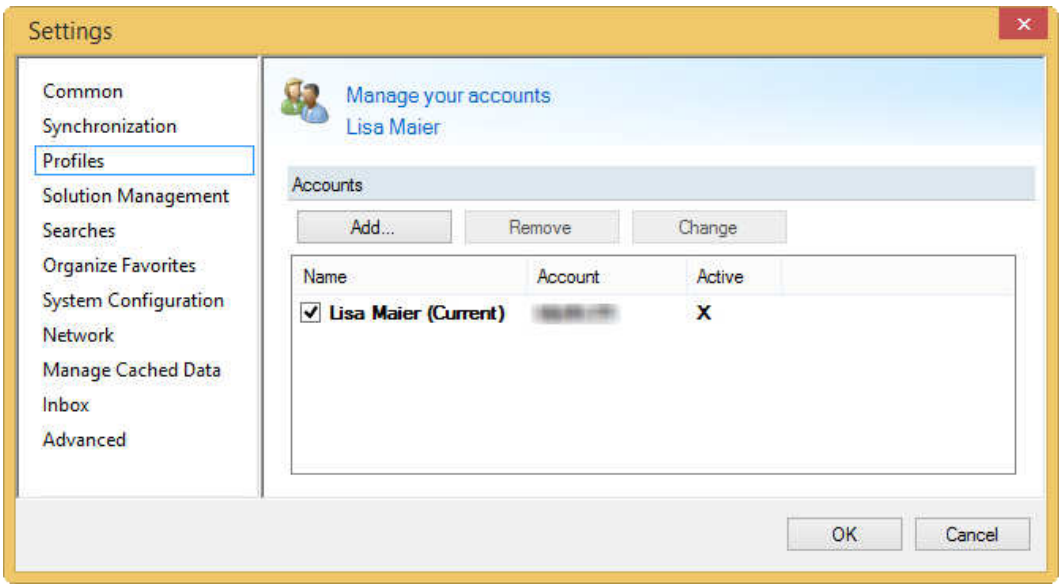
De-Mail makes it possible to send and receive messages and documents through the Internet in a confidential, secure, and verifiable manner.

If you use the De-Mail service, make sure to enable this option.

## 29.3 Profiles

### 29.3.1 Overview

The following sections go over the various options.




### 29.3.2 Adding an account

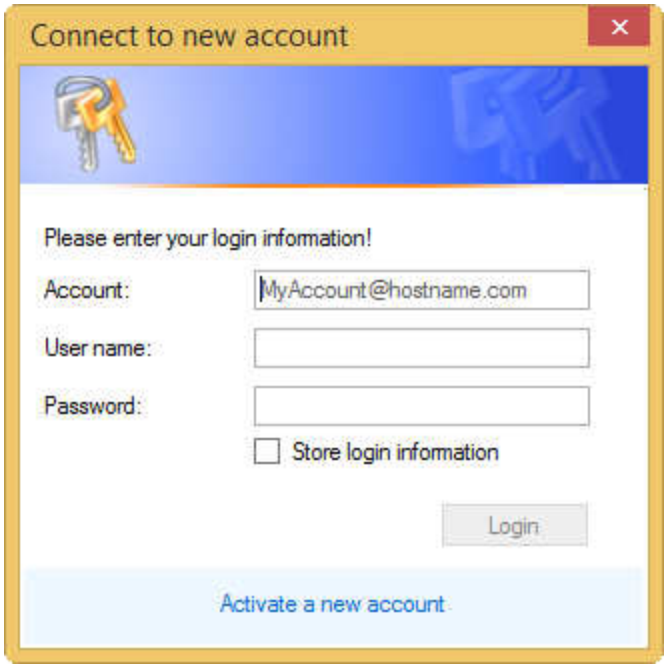
In addition to your initial user account, you can also activate additional user accounts. You will either need the corresponding activation file (.iadc file) or the complete login information for the user (account, username, and password).

When you first activate the account, you will be asked to set a new password.

**Please note:**

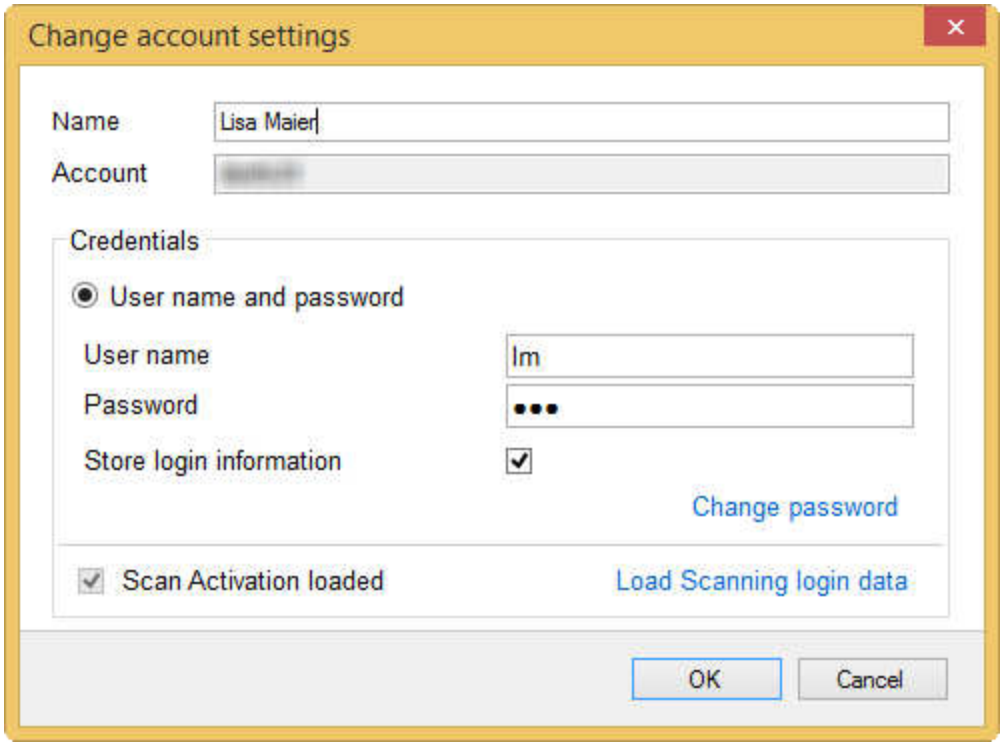
This function is relevant, for instance, to administrators who use a “normal” user account for their company’s normal business operations and limit themselves to using the administrator account for administrative purposes only.

1. Click on **Add...**
2. Follow one of the steps below:
   - Enter your login information (account, username, and password) and click on **Login**.




– Click on **Activate a new account** and select the activation file (**.iadc file**) for the account.

### 29.3.3 Changing account settings




**Changing the display name for an account**

In the **Name** field, enter the name you want for your account. Make sure the name is written the way you want the doculife Desktop status bar to show it.

**Store login information**

If this option is enabled, the login password will be saved so that it does not have to be entered the next time doculife Desktop starts.

**Please note:**

Whether this option can be enabled to begin with will depend on the configuration you are using and on your company's security requirements.

**Scan Activation loaded**

If this option is enabled, you will be able to use the scanning function.

If the scanning function has not yet been activated, click on **Load Scanning login data** and select the scanning activation file (**.iasc file**) you received from your administrator (for more information, please refer to the "Scanning documents, Activating the scanning function" section).

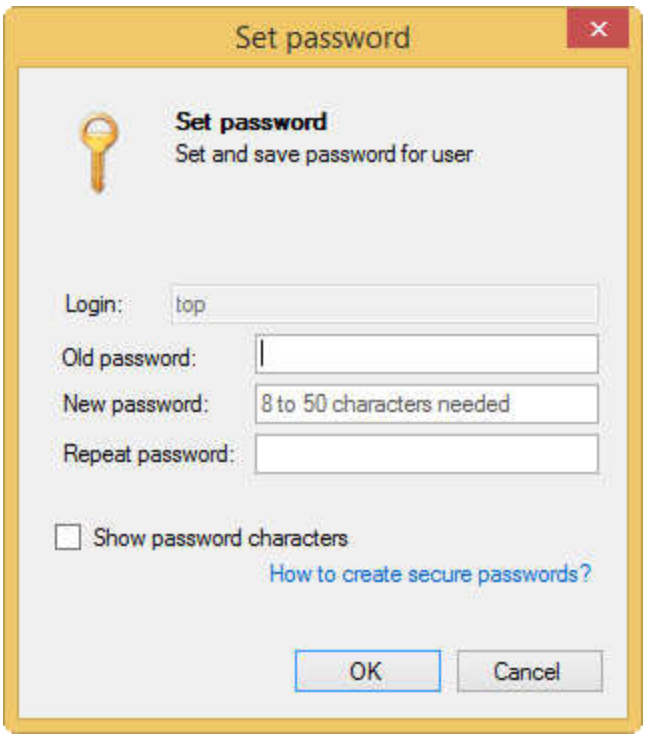
**Change password**

Click to change the password for the user who is **logged in**.

Enter the old password once and the new password twice.

The new password will only be accepted if it meets the security guidelines for strong passwords and the password in the New password and Repeat password fields match.

To look at the security guidelines, click on **How to create secure passwords?**




## 29.3.4 Deleting an account

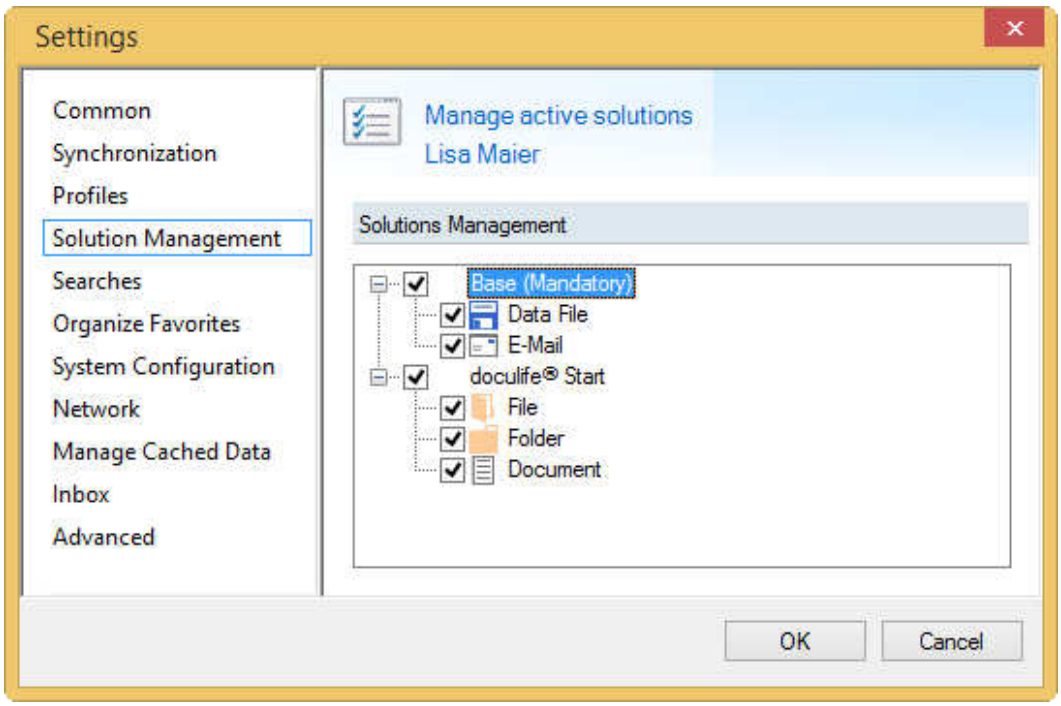
You can delete an account provided it is not the account that is currently active.

Click on the **Remove** button to delete an existing account.

## 29.4 Solution management

### 29.4.1 Overview

The following sections go over the various options.




### 29.4.2 Solutions management

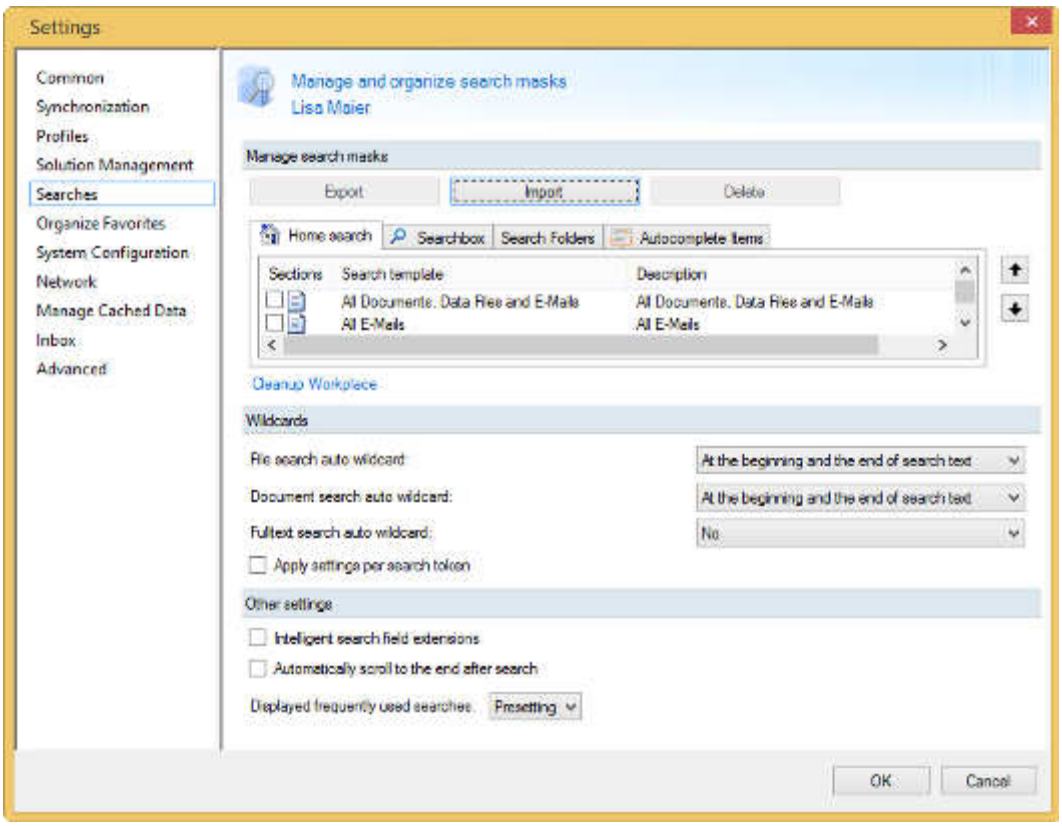
A solution is a pre-configured setup of doculife that is based on the latter's standard software but is also optimized for specific applications and/or industries and supports typical work-flows. There are specific solutions for the legal, real estate, and human resources industries, for example.

This overview can be used to view and manage all installed and active/inactive solutions.

## 29.5 Searches

### 29.5.1 Overview

The following sections go over the various options.




### 29.5.2 Manage search masks

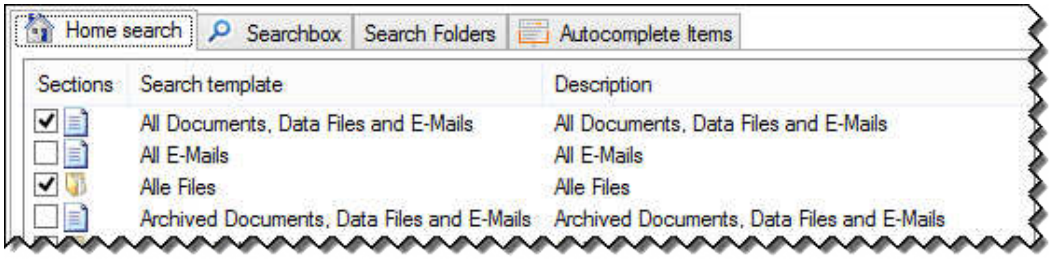
#### General functions

- **Export:** Use this function to export a selected search to the Windows filesystem in the form of an **.sem file** (exported search template). You can use this function, for instance, to provide a personal search template to another user so that they can import it.
- **Import:** Use this function to import a search (**.sem file**) from the Windows filesystem.
- **Delete:** Use this function to delete personal search templates. Default searches cannot be deleted.

#### Home search tab

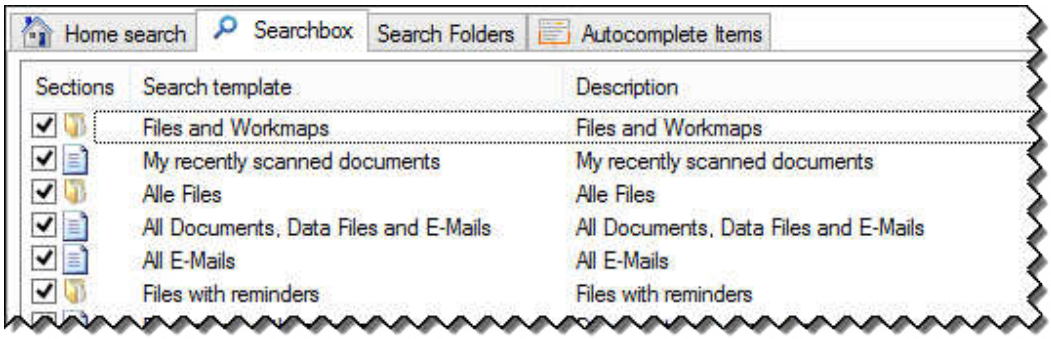
The selected searches will be offered as searches with pre-configured search parameters in the choice list for the **Home** icon.

When the search is run, the search used as a basis will be triggered with the preconfigured search parameters, and the corresponding search results will then be shown in the file and/or document pane. In other words, no search criteria are required to run these searches.




### Searchbox tab

The selected searches will be offered in the search box:

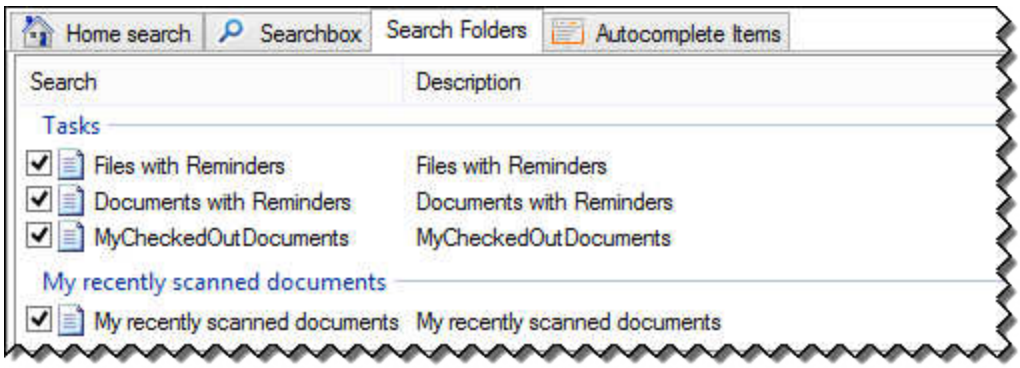



### Search Folders tab

Search folders, which can be used to group multiple searches, are provided through the solution being used. The solution's configuration also determines which searches will be in which folders.

The **Tasks** and **My recently scanned documents** folder in **My Workplace** are examples of **search folders**.

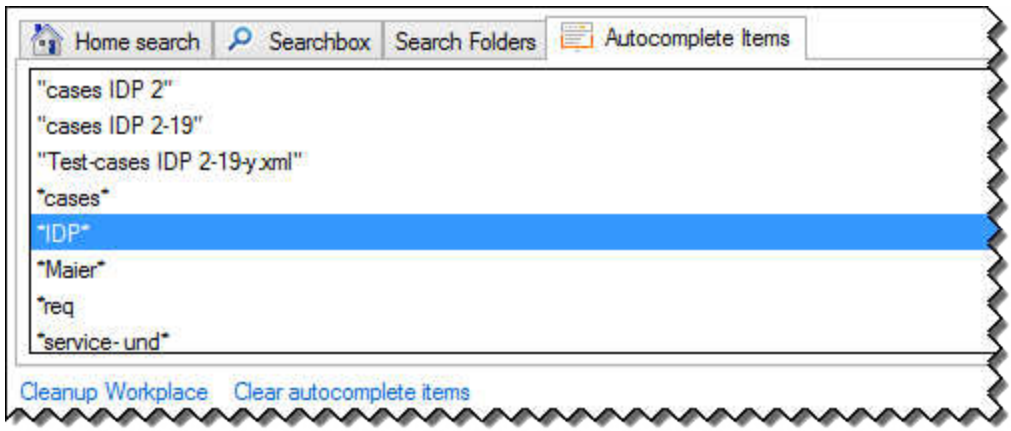
This register shows which searches will be run when you click on the corresponding search folder. You can also use it to enable and disable searches and/or search folders.




### Autocomplete Items tab

The Autocomplete Items function stores all the search terms that you have entered into the search box and will suggest them automatically the next time you are entering information into the box (autocomplete). This means that frequently used search terms only need to be entered once and can simply be autocompleted afterwards.

The **Clear autocomplete items** function will delete all the contents in this list.




**Cleanup Workplace**

This function will remove all the linked files stored in your workplace.

The actual files will not be deleted. Only the link (to the file) stored in **My Workplace** will be deleted.

### 29.5.3 Order of searches

You can change the order of the searches being shown by clicking on the up/down arrows.

### 29.5.4 Wildcards

To make searches easier, you can enter “incomplete” search terms that the doculife search function will complete automatically.

Simply use the * (asterisk) wildcard at the point where you want the function to complete the term automatically.

**Example:**


This search will find documents containing the following terms: ProjectInstructions, ProjectSchedule, ProjectBudget, etc.

You can configure these options in such a way that a wildcard will be automatically added in the All Documents, Data Files and E-Mails search.

**Please note:**

The values permitted will depend on the configuration for the tenant.

The following options are available:

- **No**: A wildcard will not be added. The program will search for the exact search terms entered.
  **Example:** manual
- **At the beginning of search text:** The wildcard will be placed at the beginning
  **Example:** *manual
- **At the end of search text:** The wildcard will be placed at the end
  **Example:** manual*

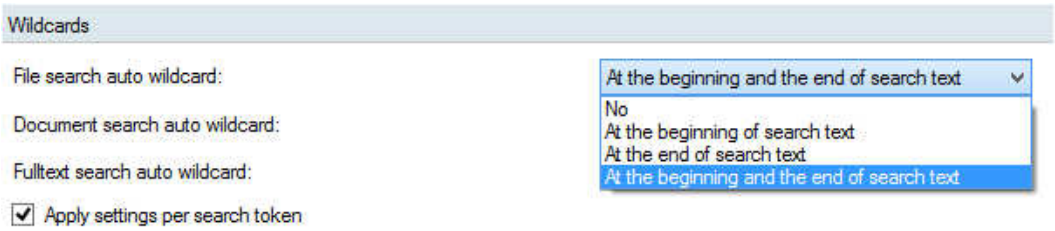
- **At the beginning and the end of search text:** A wildcard will be placed at the beginning and another one at the end
  **Example:** *manual*

**Apply settings per search token**

**Please note:**

Whether or not this function is available, as well as whether it is enabled by default or not, will depend on the configuration for your tenant.

If this option is enabled, the aforementioned settings will apply to each search term.
**Example (wildcard at the beginning and end of the search text):** *Manual* *Vitoclima*


Wildcards
File search auto wildcard:
Document search auto wildcard:
Fulltext search auto wildcard:
Apply settings per search token
At the beginning and the end of search text
No
At the beginning of search text
At the end of search text
At the beginning and the end of search text

## 29.5.5 Other settings

**Intelligent search field extensions**

Not supported in the doculife service as of this writing

**Automatically scroll to the end after search**

If this option is enabled, the program will automatically scroll to the end of the search results after a search.

**Displayed frequently used searches:**

You can use this setting to specify the number of searches that will be shown immediately in the search box's choice list. The remaining searches will be shown when you click on **More...**

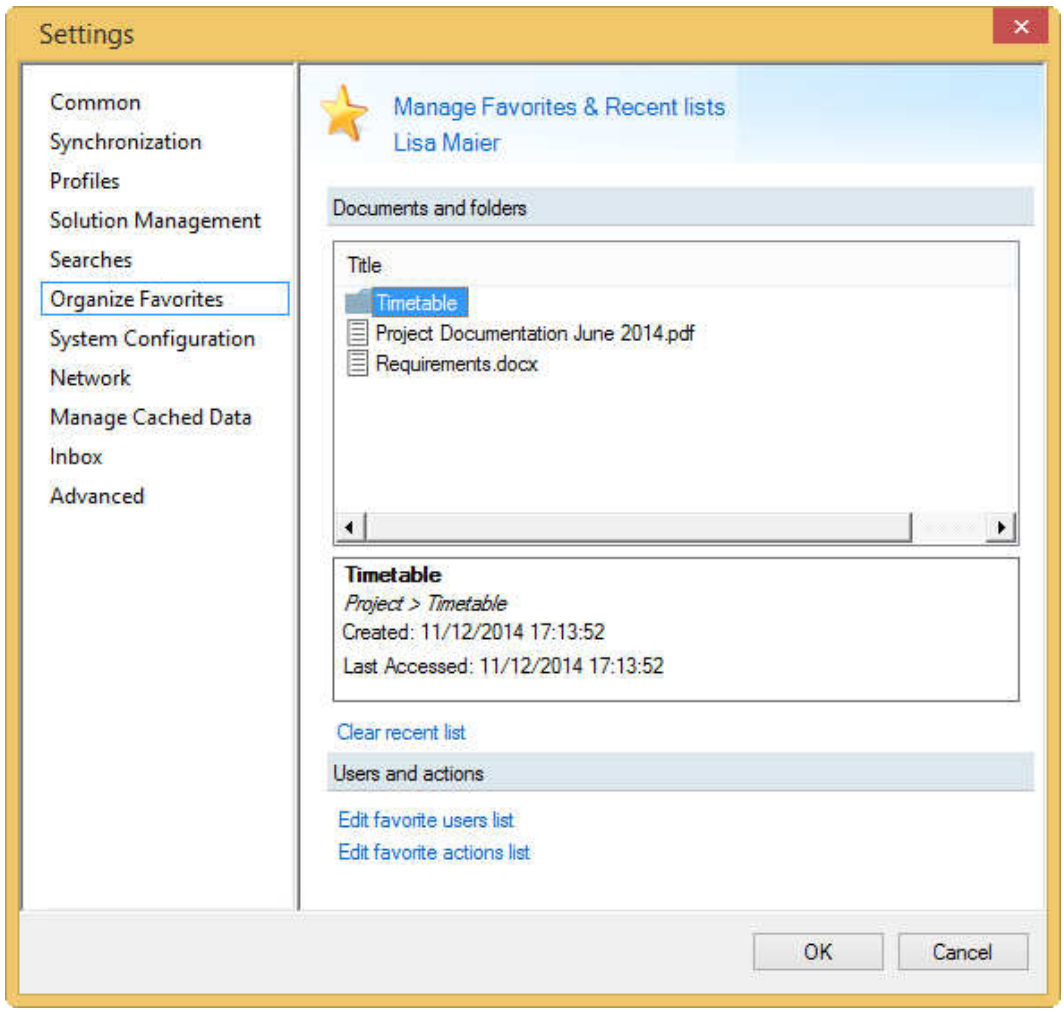
The following options will be available:

- Presetting: The template's presetting will be used. This is the default setting.
- All: All searches will be shown.
- 2/5/10 or custom number: The corresponding number of searches will be shown.

## 29.6 Favourites

### 29.6.1 Overview

The following sections go over the various options.




### 29.6.2 Removing favourites

To remove selected favourites from the list of favourites, press the **DELETE** key or **right-click on the favourites** and then click on **Remove**. This will not delete the actual files or documents – only the corresponding links within the list of favourites will be deleted.

### 29.6.3 Clearing the “My Recent” list

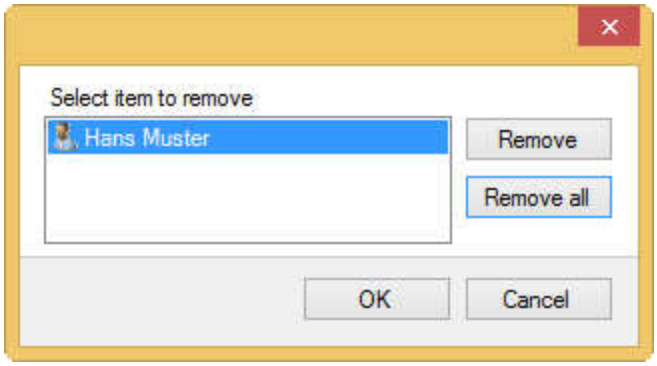
Use this function to clear the list containing the history of the objects (under favourites) you have used most recently.

### 29.6.4 Users and actions

**Edit favourite users list**

Use this function to remove entries from your list of favourite users/groups.

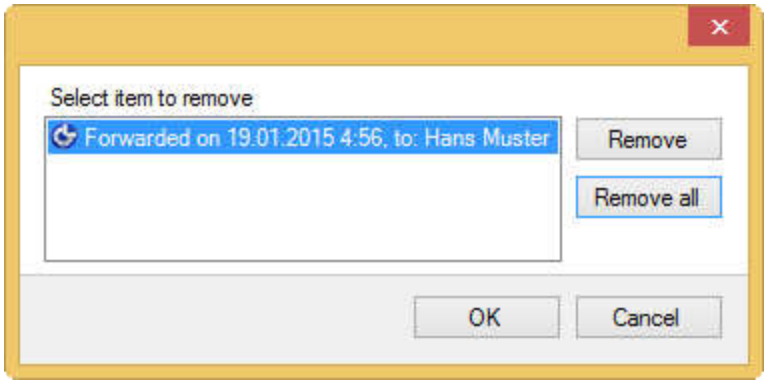
Clicking on the **Remove** button or pressing the **DELETE** key will delete an individual entry, while clicking on the **Remove all** button will clear the entire list.




### Edit favourite actions list

Use this function to remove entries from your list of favourite actions.

Clicking on the **Remove** button or pressing the **DELETE** key will delete an individual entry, while clicking on the **Remove all** button will clear the entire list.



## 29.7 System configuration

### 29.7.1 Overview

**Please note:**

This documentation does not go over any of the functions for configuring and managing doculife Desktop. For more information on these functions, please consult the administration manual for doculife.

*Figure: System configuration for privileged users*

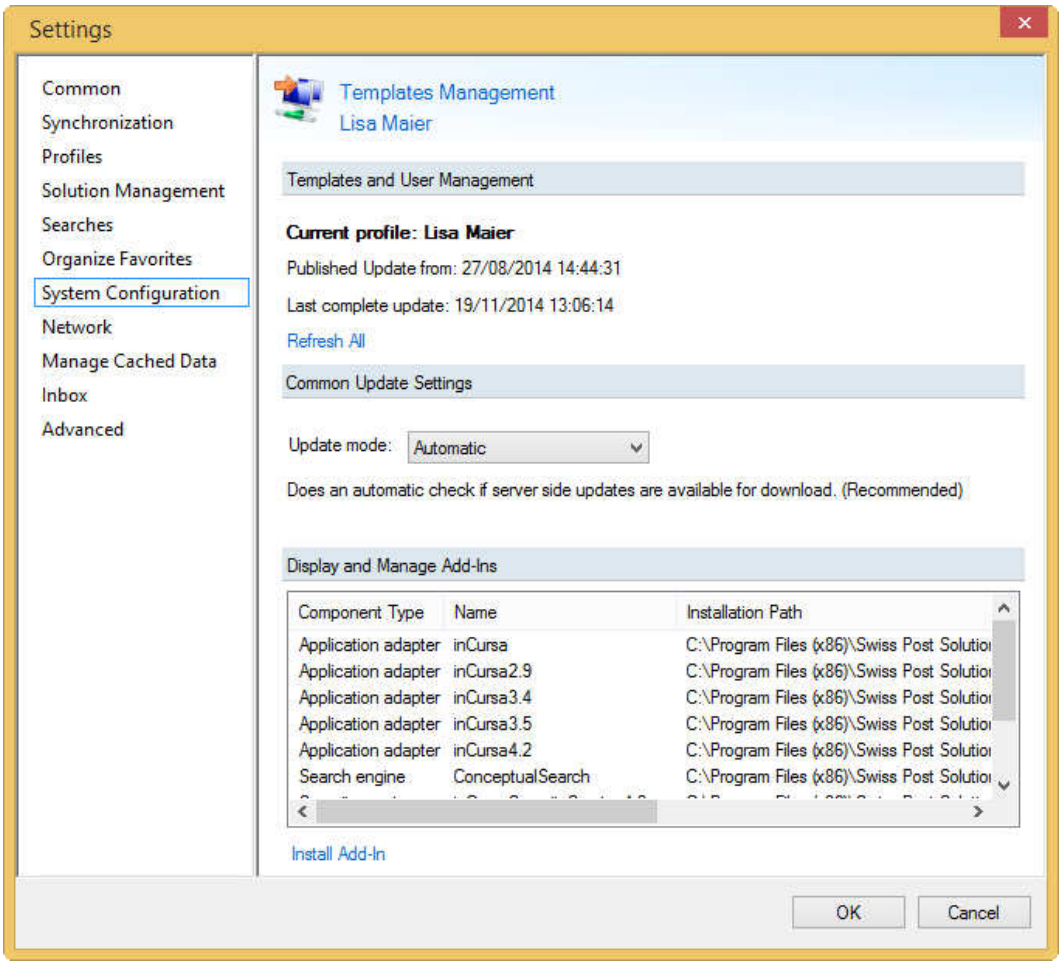
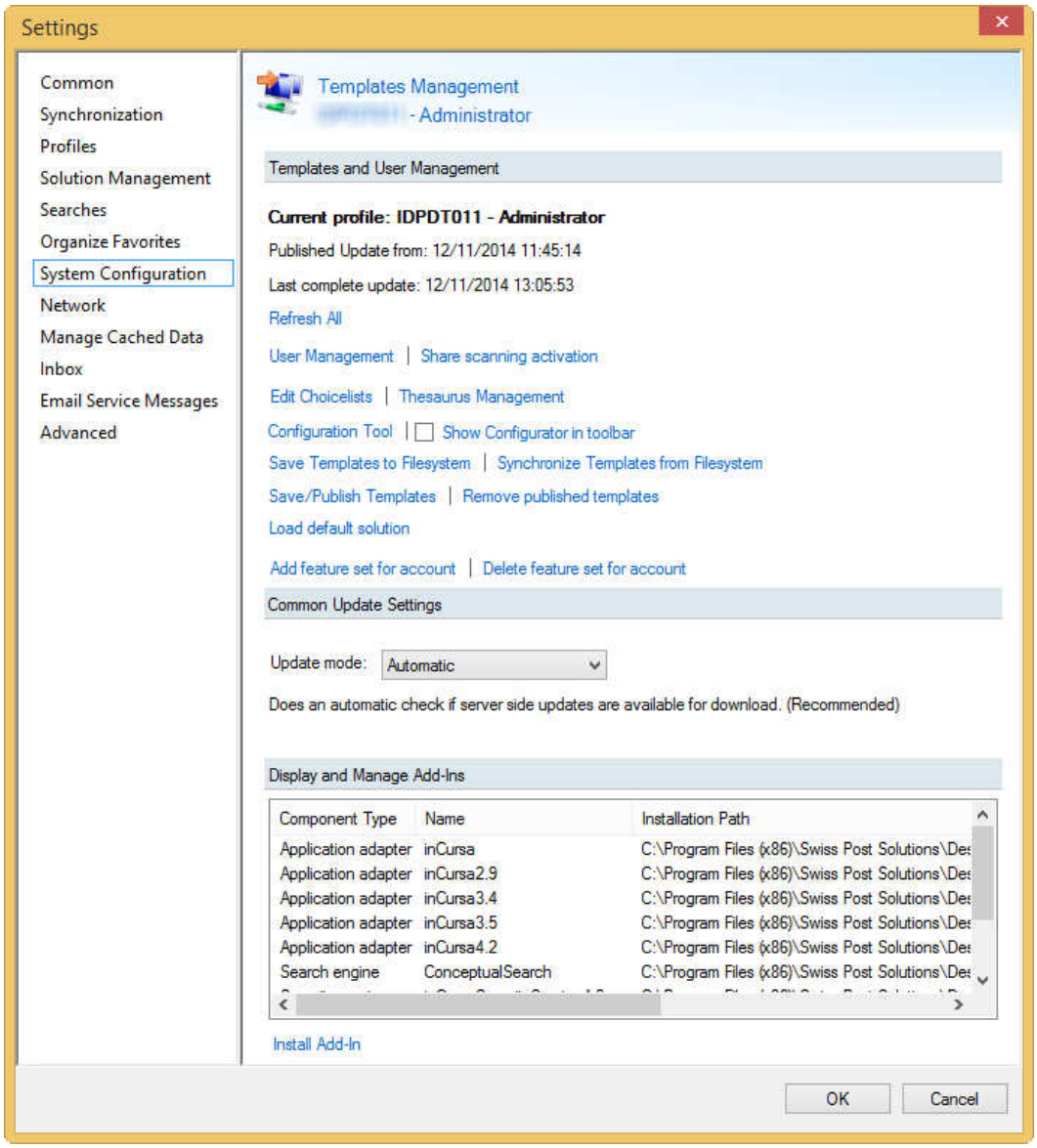


*Figure: System configuration for administrators*


Settings
Common
Synchronization
Profiles
Solution Management
Searches
Organize Favorites
System Configuration
Network
Manage Cached Data
Inbox
Email Service Messages
Advanced
Templates Management
- Administrator
Templates and User Management
Current profile: IDPDT011 - Administrator
Published Update from: 12/11/2014 11:45:14
Last complete update: 12/11/2014 13:05:53
Refresh All
User Management | Share scanning activation
Edit Choicelists | Thesaurus Management
Configuration Tool | Show Configurator in toolbar
Save Templates to Filesystem | Synchronize Templates from Filesystem
Save/Publish Templates | Remove published templates
Load default solution
Add feature set for account | Delete feature set for account
Common Update Settings
Update mode: Automatic
Does an automatic check if server side updates are available for download. (Recommended)
Display and Manage Add-Ins
Component Type
Name
Installation Path
Application adapter inCursa C:\Program Files (x86)\Swiss Post Solutions\Des
Application adapter inCursa2.9 C:\Program Files (x86)\Swiss Post Solutions\Des
Application adapter inCursa3.4 C:\Program Files (x86)\Swiss Post Solutions\Des
Application adapter inCursa3.5 C:\Program Files (x86)\Swiss Post Solutions\Des
Application adapter inCursa4.2 C:\Program Files (x86)\Swiss Post Solutions\Des
Search engine ConceptualSearch C:\Program Files (x86)\Swiss Post Solutions\Des
Install Add-In
OK
Cancel

## 29.7.2 Templates and user management

### Info section

The info section will show the following information:

- The name of the profile with which you are currently logged in
- Published Update from: The date and time of the latest published template update
- Last complete update: The date and time of the most recent complete update

### Refresh All

This function will update all templates and all choice lists with the program still running.

**Please note:**

It is recommended to have the program run updates automatically (see “Common Update Settings”) and to manually synchronize the templates and choice lists only when necessary.

### 29.7.3 Common update settings

**Update mode**

Every time doculife Desktop starts, the program will check whether there are any new updates on the server than need to be transferred and installed.

The following options are available:

- **Automatic:** The program will automatically check whether there are any new templates on the server and load them. This is the recommended setting.
- **Always:** The program will always check all the settings on the server. This may take a few minutes.
- **Manual:** The program will not check whether there are any new updates on the server. If you select this option, updates will have to be carried out manually. Recommended for experienced users only.

### 29.7.4 Display and manage add-ins

This list shows the add-ins that have been installed.

To install an add-in, click on **Install Add-In** and select the add-in in the Windows File Explorer (add-in .zip folder).

To uninstall an add-in, **right-click** on it and then click on **Uninstall** (you will only be able to do this if you have the required permissions).

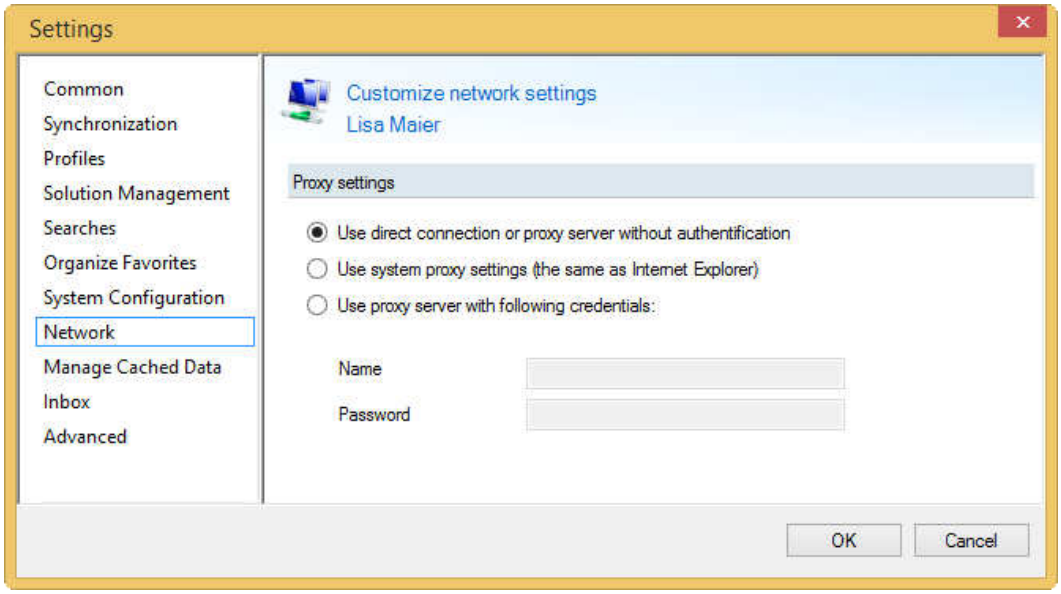
**Please note:**

Add-ins should be installed and uninstalled only after consulting with your administrator.

## 29.8 Network

### 29.8.1 Overview

The following sections go over the various options.




### 29.8.2 Proxy settings

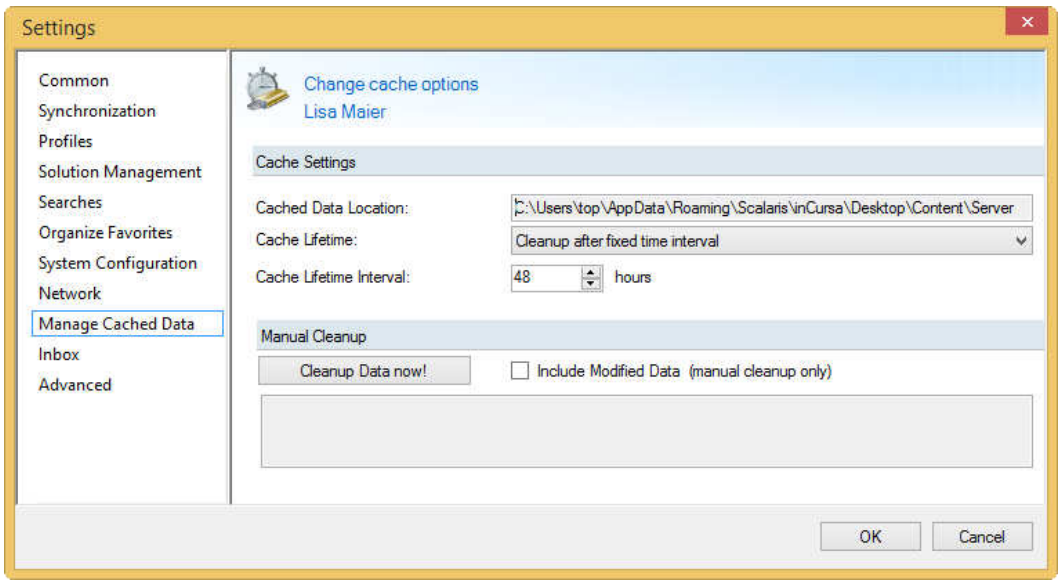
Settings used for authentication when the Internet connection is established using a proxy server.

The **Use direct connection or proxy server without authentification** option will be enabled by default. If a different type of authentication is required by your company, please contact your administrator.

## 29.9 Manage cached data

### 29.9.1 Overview

The following sections go over the various options.




### 29.9.2 Cache settings

The cache is used to store temporary files locally on your hard drive. These files include, for instance, log files, settings, edited documents, and documents that have not yet been

checked in.

The cache should be cleared on a regular basis.

**Cached Data Location**

Shows the storage location for local files.

**Cache Lifetime**

This function specifies whether locally stored data should be deleted automatically.

- **Switch off:** No automatic cache clearing. If you select this option, you will have to clear the cache manually.
- **Cleanup on demand:** The cache will be cleared upon request.
- **Cleanup after fixed time interval:** The cache will be cleared automatically at the interval specified in **Cache Lifetime Interval**.
  This is the recommended default setting.

**Cache Lifetime Interval**

The cache lifetime interval can be used to define the interval at which the cache will be automatically cleared.

The default setting is 48 hours.

### 29.9.3 Manual cleanup

You can clear the cache manually at any time.

**Cleanup Data now!**

Cached data will be deleted as soon as you click on this button.

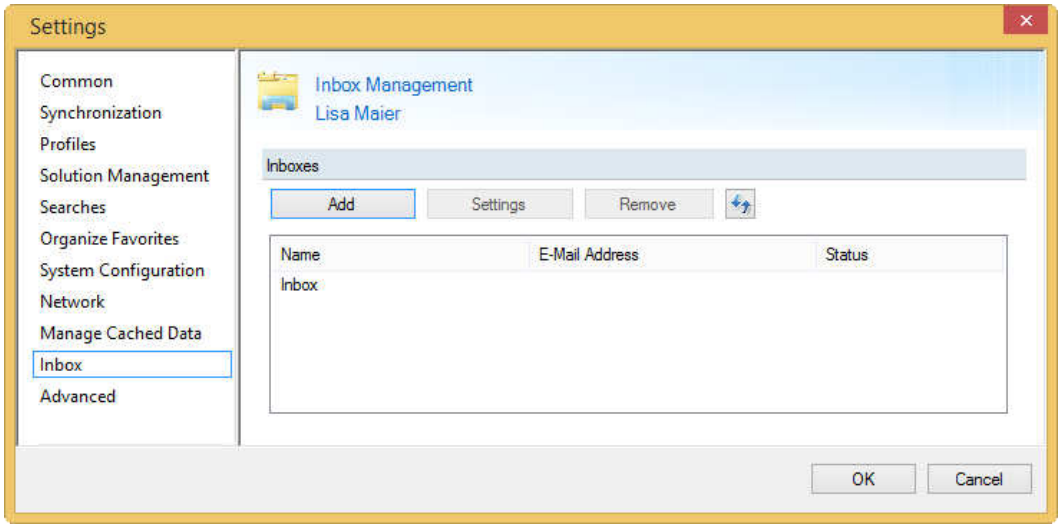
**Include Modified Data (manual cleanup only)**

If this option is enabled, modified documents that have not yet been checked in will be deleted as well. Before the action is carried out, you will get a prompt asking you whether you are sure you want to continue.

## 29.10 Inbox

### 29.10.1 Overview

The following sections go over the various options.



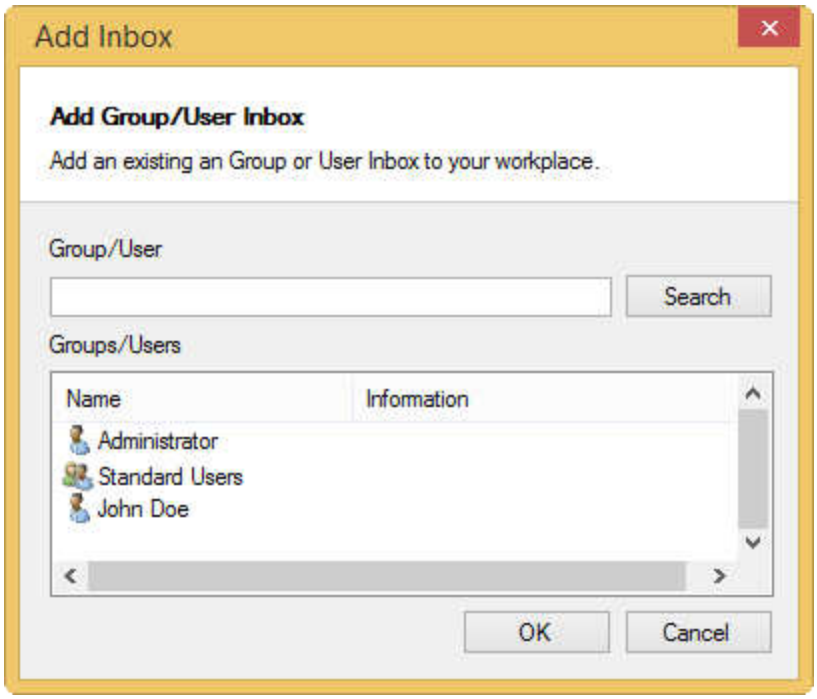

### 29.10.2 Add

Click on this button to add an additional inbox to your workplace.

- **Group Inbox**: Group inboxes contain documents that have been forwarded to a group so that they can be worked with (see the “Forward” function).
  In order to be able to edit the corresponding contents, you need to be a member of the group in question.
- **Standard Error Inbox:** This is the inbox for scanned documents that cannot be delivered. Just as with the previous case, you need to be a member of the group in order to be able to edit the corresponding contents.

Click on **Search** to view the selection of available inboxes and then **double-click** on the inbox you want to add it.

The inbox will be added to your workplace.



**Please note:**

The “Standard inbox” group inbox is no longer relevant. It only continues to exist in order to ensure compatibility with earlier program versions.

**Please note:**

The overview will also list user inboxes. However, you will not be able to access any other users’ user inbox!

### 29.10.3 Remove

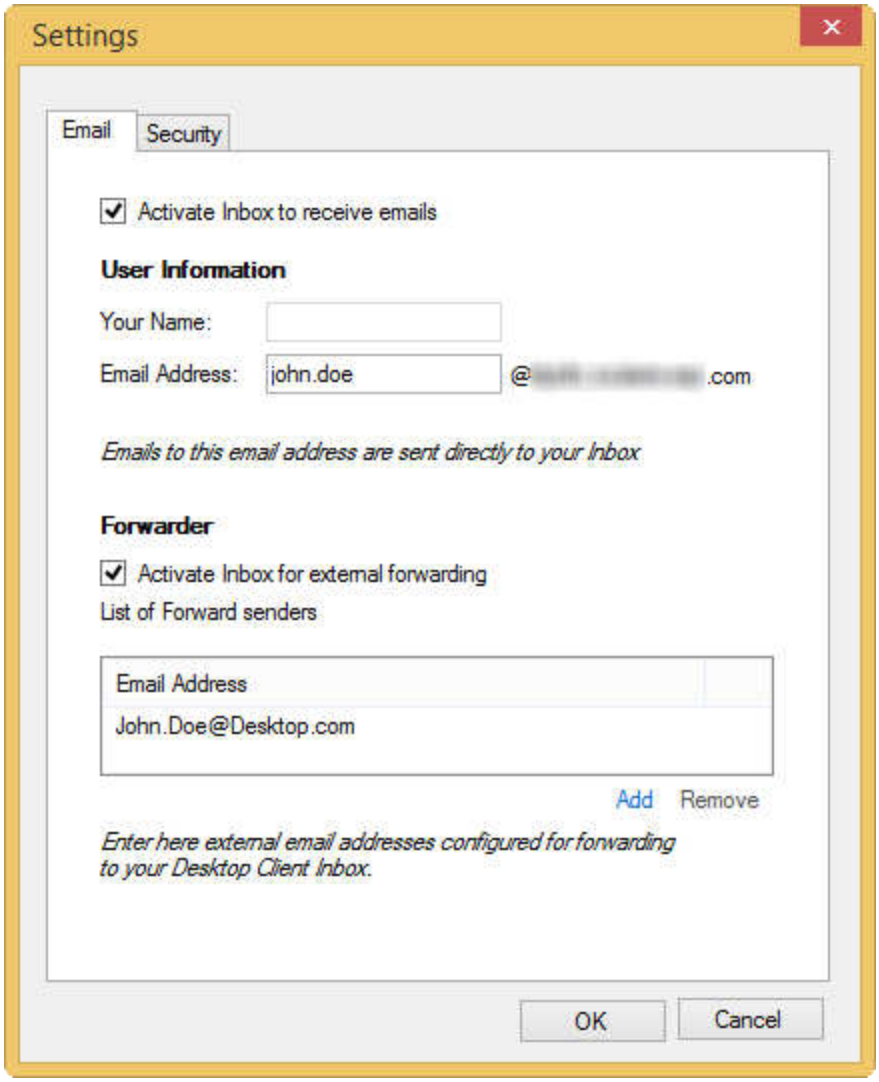
Click on this button to remove inboxes that have been added previously.

**Tip:**

To remove a group inbox from your workplace, **right-click** on it and select the **Remove from My Workplace** option.

## 29.10.4 E-mail settings

### 29.10.4.1 E-mail




**Activate Inbox to receive emails**

Enabling this option will enable your personal doculife inbox to receive e-mails.

**User Information**

In the **Email Address** field, enter the username that you want to use to receive e-mails in your inbox. The program will check whether the username you enter is valid.

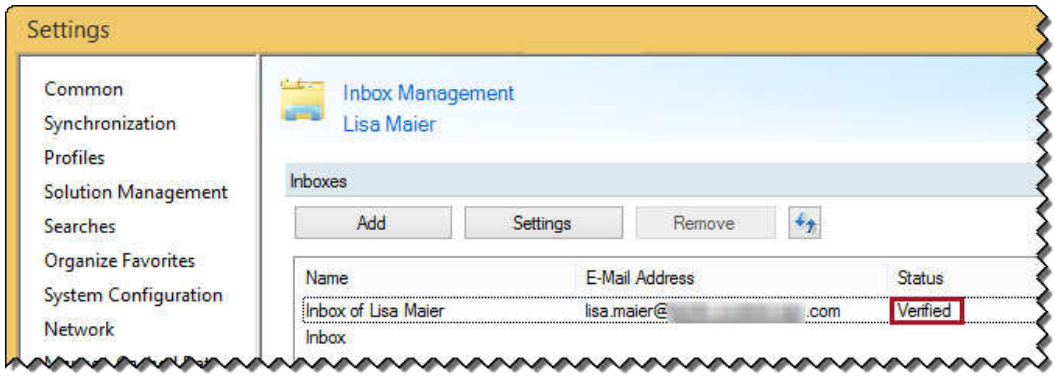
Important: The mail server and the domain are preset and cannot be changed.

Important: The username must be unique and must not include any spaces, umlauts, or special characters.

The full e-mail address will be: **username@doculife-MailDomain**, e.g., jane.-doe@re001013.companyx.com

The e-mail address will be automatically enabled on the server. This may take a few minutes. You can check the inbox overview to see whether the address has already been enabled. As soon as the status says “Verified,” the e-mail address will be up and working.

Important: In addition, you will get an e-mail in your inbox as soon as the e-mail address is enabled.




Important: All senders from whom you want to receive e-mails must be added to the list of explicitly allowed senders in the **Security** tab! These senders will be internally added to a whitelist and the server will allow them to send you messages. Please note that only full addresses are allowed and that attempting to whitelist an entire domain (e.g., companyx.com) will not work.

### Forwarding

Enabling forwarding is a good idea in the following cases:

- When all users within a company need to be able to communicate with each other using their doculife e-mail addresses.
- When you want to be able to forward e-mails to your own doculife e-mail address. This is helpful when you do not want to disclose your doculife e-mail address “officially” outside the organization. In this case, you can simply forward e-mails as attachments in .msg format either individually or using sets of rules. The e-mail will then reach your inbox and be handled as though it were the original, i.e., the e-mail’s original sender will be shown in the inbox.

In both cases, you will need to store your “normal” company e-mail address as a forwarding address. Every forwarding address will be internally added to the whitelist and the server will allow it to send you messages. In other words, this will make these forwarding addresses valid sender addresses.

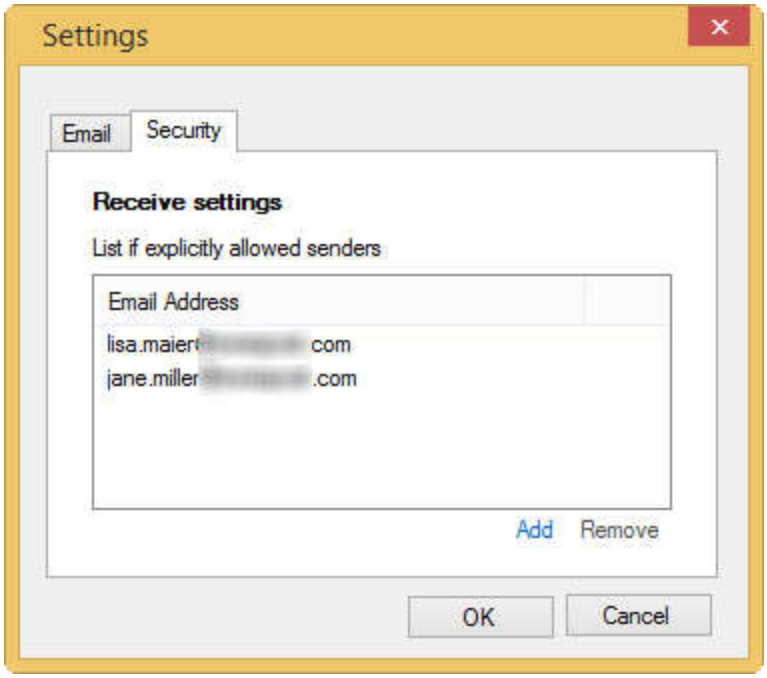
#### 29.10.4.2 Security

The doculife inbox can only receive e-mails from senders who have been added to the list of explicitly allowed senders. The purpose of this is to prevent spam from being delivered to the doculife inbox.

The sender addresses will be automatically whitelisted on the server. This may take some time.

To add an e-mail address, click on **Add**.

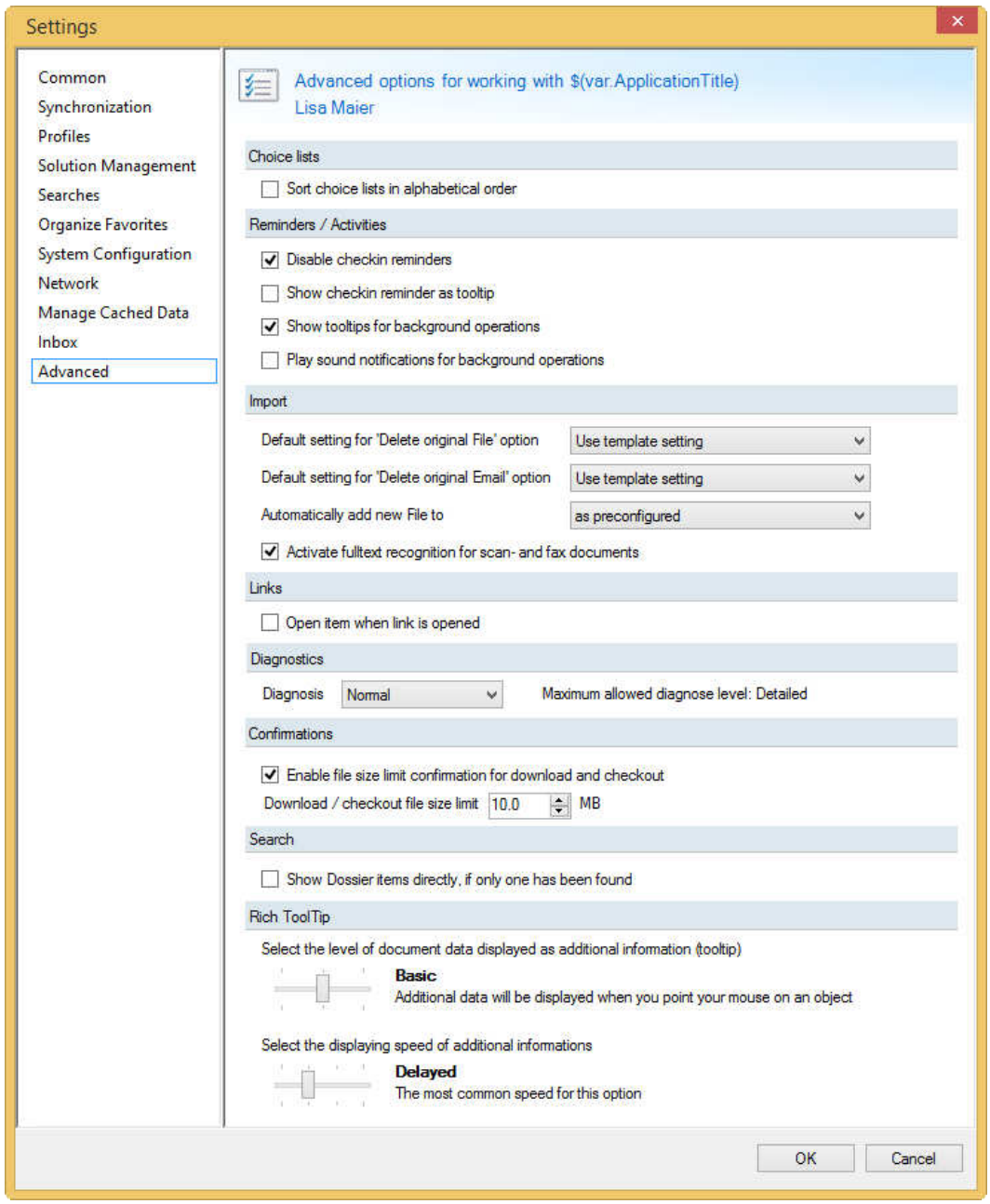
To remove an e-mail address, click on **Remove**.



## 29.11 Advanced

### 29.11.1 Overview

The following sections go over the various options.




### 29.11.2 Choice lists

**Sort choice lists in alphabetical order**

Enable this option if you want the contents in a choice list to be sorted in ascending alphabetical order.

### 29.11.3 Reminders

**Disable checkin reminders**

Enable this option if you want to turn off check-in reminders. When you do this, the program will no longer show reminders for checking in a document after it has been edited in Microsoft Office (please refer to the “Checking documents out and back in” section).

**Show checkin reminder as tooltip**

Enable this option if you want the reminder to be shown as a tooltip instead of as a dialog box.

**Show tooltips for background operations**

Enable this option if you want the program to show additional information, in the form of a tooltip in the information pane, for functions that are running in the background. Background operations include, but are not limited to, deleting documents/files, copying file structures, importing e-mails and documents, and sending e-mails and documents to a ZIP file.

**Play sound notifications for background operations**

Enable this option if you want the program to play a sound notification when a background operation is completed.

### 29.11.4 Import

**Default setting for ‘Delete original File/Email’ option**

Used to set the default setting for this option when importing documents or e-mails from the filesystem.

- **No**: Disables the option.
  Documents/e-mails will be retained in the filesystem after being imported.
- **Yes**: Enables the option.
  Documents/e-mails will be deleted from the filesystem after being imported.
  Special e-mail behaviour: E-mails sent from the DMS will automatically be deleted from the “Sent Items” folder in Outlook after being sent.
- **Use template setting**: Uses the template’s setting. The configuration for doculife Desktop will determine what the template’s setting will be (the default setting in the template will be “No” for documents and for e-mails).

**Automatically add new file to**

A file can be automatically added to the workplace and/or library when created. This option is used to define which option will be offered when a file is created.

- **off:** The function will be disabled and will not be offered
- **My Workplace & My Library:** It will be possible to add the file to the workplace and the library
- **My Workplace:** It will be possible to add the file to the workplace
- **My Library:** It will be possible to add the file to the library
- **Use configured setting**: Uses the template’s setting.

**Activate fulltext recognition for scan- and fax documents**

If this option is enabled and PDFs or image files (.jpg or .tif) are imported, the program will check whether these files contain full text and will run full text OCR processing if necessary.

### 29.11.5 Links

**Open item when link is opened**

Enable this option if you want the document for a link to be opened when you double-click on the link.

If the option is not enabled, the document will first be selected in the document pane only, after which you can open it by double-clicking on it again.

### 29.11.6 Diagnostics

**Diagnosis**

Used to select the diagnostic program setting for error logging in the log file. This setting will have an impact on the log file's size and the level of detail.

The default setting is **Default**.

**Please note:**

Do not change this setting without consulting with your solution vendor first.

### 29.11.7 Confirmations

**Enable file size limit confirmation for download and checkout**

If this option is enabled and a document exceeds a specific file size, the system will actively ask you whether you are sure you want to check out or download the document. The corresponding prompt will allow you to cancel the checkout/download process if you want.

**Download / checkout file size limit**

Used to specify the file size starting at which the system will show the prompt.

### 29.11.8 Search

**Show Dossier items directly, if only one has been found**

If a search returns one single file only and this option is enabled, the program will automatically open the file and show its contents in the document pane.

### 29.11.9 Rich ToolTip

**Select the level of document data displayed as additional information (tooltip)**

Additional information will be shown as a tooltip when you move your cursor over a document in the search results, for example. You can use this slider to select the level of detail for this additional information.

- **Off:** No additional information will be shown.
- **Basic:** Additional information will be shown as soon as you move the cursor over an object. This is the default setting.
- **Detailed**: Additional information with a thumbnail will be shown as soon as you move the cursor over an object.

**Select the displaying speed of additional information:**

You can use this slider to select the delay before a tooltip is shown.

- **Immediately:** The tooltip will be shown immediately as soon as you move the cursor over an object.
- **Delayed:** The tooltip will be shown after a delay. This is the default setting.
- **Later:** The tooltip will be shown later on.
- **Much later:** The tooltip will be shown much later on.

# 30 Archiving files and documents (optional)

## 30.1 What is the purpose of archiving?

You can archive files and documents in order to meet requirements concerning tamper-proof, long-term retention.

When a file or document is archived, all users will lose their editing and deletion permissions for it until the retention period set during archiving elapses. In other words, users can only have read-only access to archived files and documents.

**Please note:**

Once an item is archived, it cannot be modified or deleted until the corresponding retention period (archiving period) elapses. Once the archiving period elapses, the users with the corresponding permissions can permanently delete the corresponding files and documents.

Archived objects are identified with a lock icon.

*Figure: Archived file*

## 30.2 Requirements for archiving

In order for a file or document to be archived, the following requirements must be met:

- The document being archived must have been checked in
- The file being archived must not contain any
  - Documents that are still checked out
  - Links to documents stored in a different file

When the archiving process is started, the program will automatically check whether these requirements are met.

If a document is checked out or a file contains documents that have been checked out, you will need to fix the conflict first by cancelling the checkout or the archiving process. Meanwhile, if a file contains links to documents that are stored in a different file, you will have the option of removing the links or replacing them with copies of the corresponding documents.

Before starting, make sure that the file meets the following requirements in accordance with the regulations, industry-specific guidelines, and internal organizational instructions that apply to your company:

- The file is complete
- Any documents that are not needed and are not subject to mandatory retention have been removed

**Please note:**

Once a file is archived, you will no longer be able to store documents in it. Because of this, make sure that all the contents are complete and comply with the regulations, industry-specific guidelines, and internal organizational instructions that apply to your company before getting started with the archiving process.

**Please note:**

The selected retention period cannot be changed once a document or file is archived. Accordingly, make sure to set the retention period required for the file(s) and the documents contained therein as per the regulations, industry-specific guidelines, and internal organizational instructions that apply to your company.

## 30.3 Archiving items

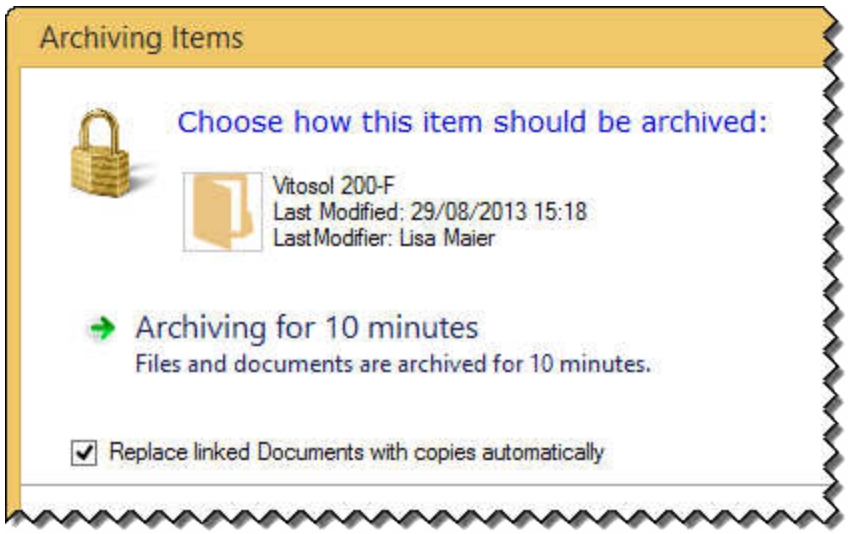
**Please note:**

Make sure that all the requirements for archiving are met (please refer to the “Requirements for archiving” section).

1. **Right-click** on the item you want and click on **Archive**.
2. Select the retention period you want.

   Important: The retention periods available for selection will be those that are relevant to your company and that have been set up.

   Enable the **Replace linked Documents with copies automatically** option. This will replace links with copies of the corresponding documents so that you can archive the documents.


Archiving Items
Choose how this item should be archived:
Vitosol 200-F
Last Modified: 29/08/2013 15:18
LastModifier: Lisa Maier
Archiving for 10 minutes
Files and documents are archived for 10 minutes.
Replace linked Documents with copies automatically

   As soon as you select a retention period, the program will check whether the item can be archived.

   If there are no conflicts preventing the item from being archived, three additional dialog boxes will be shown in succession.

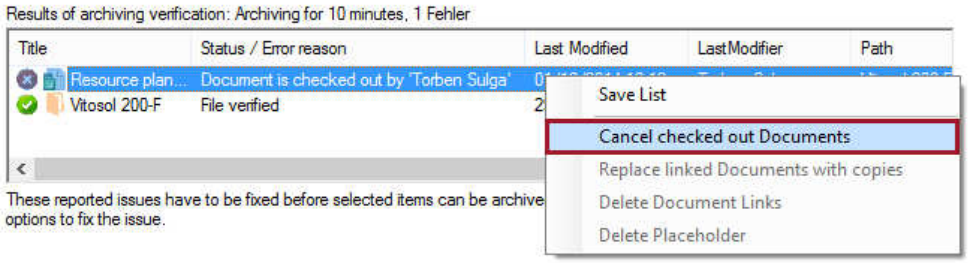
   If an error occurs, the **Results** pane will show the corresponding conflicts.

   In the example below, the file contains a document that is checked out:

To fix the conflict, right-click on it. Then click on the appropriate option in the context menu (**Cancel checked out Documents**, for example).

Important: The options shown in the context menu will depend on the type of conflict.

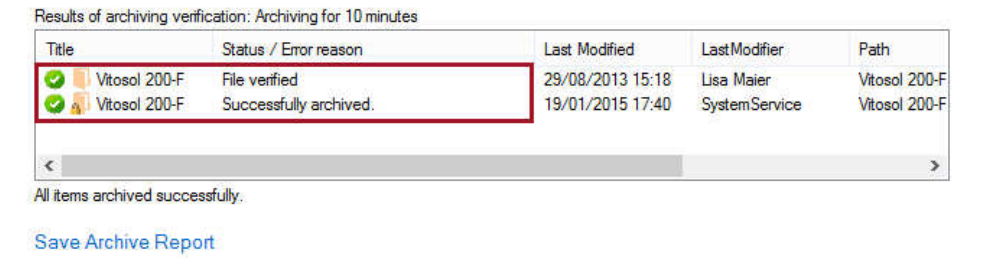
To generate a list of all the conflicts in CSV format, click on **Save List**.




Once you have fixed all conflicts, click on **Next**.

3. In the **Completeness of the Dossier** dialog box, confirm that the item you want to archive is complete and then click on **Next**.
4. In the **Removal of Unnecessary Documents** dialog box, confirm that you have checked the item to make sure that any documents that you do not want to archive have been removed. Click on **Next**.
5. In the **Confirmation** dialog box, confirm that all the required steps for proper archiving have been followed.
6. Click on **Archive now** to start archiving the item. The program will log your username and the date when the item was archived.

   Once the archiving process is complete, the **Archiving Items** dialog box will show the results from the archiving verification, as well as the results for the archiving process itself.




7. Click on **Save Archive Report** if you want to save the results from the archiving verification and for the actual archiving process in a CSV file for your own records.

# 31 Comparing documents (optional)

## 31.1 General information

You can use a comparison tool to quickly and reliably compare two documents with each other and show the differences between them.

doculife Desktop supports the use of a comparison tool, which will be seamlessly integrated into the DMS after being installed.

**Workshare® Compare** is used as an example to explain how a comparison tool works once integrated into doculife Desktop.

**Please note:**

Workshare Compare is not included with doculife Desktop and must be purchased separately.

## 31.2 Running a document comparison

**Please note:**

This section uses “Workshare Compare” as an example to illustrate how a comparison tool is integrated. This tool is not included with doculife Desktop and needs to be purchased separately.

You can use a comparison tool to compare two documents with each other and show the differences between them.

The DMS has the following options for using the document comparison feature:

- You can compare two documents stored in the DMS
- You can compare a document in the DMS with a local computer file
- You can compare two versions of the same document

**Comparing two documents stored in the DMS**

1. Select the two documents that you want to compare.

   Pay attention to the order in which you select them: the document you select first will be the original document, while the second will be the modified one.
2. **Right-click** and then click on **Compare with Workshare Compare**.

   Workshare Compare will start running.

**Comparing a document in the DMS with a local computer file**

1. **Right-click** on the original document in the DMS and then click on **Compare with local file in Workshare Compare**.

   Workshare Compare will start running.
2. Select the computer file (the modified document) with which you want to compare the original document and click on **OK**

   .

**Comparing two versions of the same document**

1. **Right-click** on the document and then click on **Versions**.
2. Select the two versions that you want to compare.

   Pay attention to the order in which you select them: the version you select first will be the original version, while the second will be the modified one.
3. **Right-click** and then click on **Compare with Workshare Compare**.

   Workshare Compare will start running.

# 32 Additional information

## 32.1 List of stop words

The following stop words will be left out during full-text indexing:

| | | | | |
|---|---|---|---|---|
| ab | ebenso | meine | weit | non |
| aber | ehe | meinem | welche | nor |
| allein | ein | meinen | welchem | not |
| als | eine | meiner | welchen | of |
| also | einem | meines | welcher | on |
| am | einen | mich | welches | one |
| an | einer | mir | wem | only |
| auch | eines | mit | wen | onto |
| auf | entlang | nach | wenn | or |
| aus | er | nachdem | wer | our |
| außer | es | nämlich | weshalb | ours |
| bald | etwa | neben | wessen | s |
| bei | etwas | no | wie | shall |
| beim | euch | nicht | wir | she |
| bin | euer | nichts | wo | should |
| bis | eure | noch | womit | since |
| bißchen | eurem | nun | zu | some |
| bist | euren | nur | zum | still |
| da | eurer | ob | zur | such |
| dabei | eures | oberobgleich | zwar | t |
| dadurch | für | oder | zwischen | than |
| dafür | fürs | ohne | a | that |
| dagegen | ganz | paar | all | the |
| dahinter | gar | sehr | almost | their |
| damit | gegen | sei | although | them |
| danach | genau | sein | and | then |
| daneben | gewesen | seine | any | there |
| dann | her | seinem | are | therefore |
| daran | herein | seinen | as | these |
| darauf | herum | seiner | at | they |
| daraus | hin | seines | be | this |
| darin | hinter | seit | because | those |
| darüber | hintern | seitdem | been | though |
| darum | ich | selbst | both | through |
| darunter | ihm | sich | but | thus |
| das | ihn | Sie | by | to |
| dasselbe | Ihnen | sie | can | too |
| daß | ihnen | sind | could | until |
| davon | ihr | so | d | ve |
| davor | ihre | sogar | did | very |
| dazu | Ihre | solch | do | we |
| dazwischen | ihrem | solche | does | were |
| dein | Ihrem | solchem | either | what |
| deine | ihren | solchen | for | when |
| deinem | Ihren | solcher | from | where |
| deinen | Ihrer | solches | had | whether |
| deiner | ihrer | sondern | has | which |
| deines | ihres | sonst | have | while |
| dem | Ihres | soviel | having | who |
| demselben | im | soweit | he | whose |
| den | in | über | hers | why |
| denn | ist | um | here | will |
| der | ja | und | him | with |
| derselben | je | uns | his | would |
| des | jedesmal | unser | how | yet |
| desselben | jedoch | unsre | however | you |
| dessen | jene | unsrem | i | your |
| dich | jenem | unsren | if | yours |
| die | jenen | unsrer | into | |
| dies | jener | unsres | is | |
| diese | jenes | vom | it | |
| dieselbe | kaum | von | its | |
| dieselben | kein | vor | just | |
| diesem | keine | während | ll | |
| diesen | keinem | war | me | |
| dieser | keinen | wäre | might | |
| dieses | keiner | wären | Mr | |
| dir | keines | warum | Mrs | |
| doch | man | was | Ms | |
| dort | mehr | wegen | my | |
| du | mein | weil | no | |

## 32.2 Full-text indexing document formats

Full texts will be indexed for the following document formats: txt, xml, html, doc, docx, xls, xlsx, ppt, pptx, pdf, msg, eml, csv, rtf, vsd, vsdx, mpp, odt, ods, odp.

# 33 Keyboard shortcuts

| Open / close | Shortcut |
|---|---|
| Open doculife Desktop | CTRL + F3 |
| Close doculife Desktop | CTRL + F3 |
| Open doculife Desktop in a separate window | CTRL + SHIFT + F3 |

| e-mails | Shortcut |
|---|---|
| Store e-mail and attachment separately | CTRL + left mouse button |
| Store e-mail – index e-mail | ALT + left mouse button |

| Send to | Shortcut |
|---|---|
| Send to, favourites | CTRL + D |
| Send to, folder view | CTRL + Shift + D |

| Edit | Shortcut |
|---|---|
| Copy | CTRL + C |
| Cut | CTRL + X |
| Paste | CTRL + V |
| Rename | CTRL + R or F2 |
| Select all | CTRL + A |
| Undo | CTRL + Z |
| Repeat | CTRL + R |

| General information | Shortcut |
|---|---|
| Viewing properties | ALT + ENTER |
| Show/hide folder view | CTRL + ALT + B |
| Rename | F2 (if configured)<br>CTRL + R |
| Open context menu | S + F10 |
| Focus on a different pane (clockwise): Functions, folder view, workplace, and document pane | F6 |
| Enable/disable document filters | CTRL + L |

**Please note:**

“Shift” refers to the key used to type capital letters that is normally labelled “Shift”

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